Council Report

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Date: Oct. 20, 2014 File No: 0600-04
To: Mayor and Council
From: Annette Antoniak, City Manager
Subject: **Quarterly update for period ending Sept. 30, 2014**

Staff Recommendation

THAT Council receive the quarterly update on Council strategic priorities and staff departmental work plans for the period of July 1 to Sept. 30, 2014, for information.

Background

On August 15, 2011, Council endorsed the following vision statement for the City of Penticton: "Penticton – a vibrant, innovative, adventurous waterfront City focused on sustainability, community and economic opportunity." With the vision in place, Council established its Strategic Priorities for the 2011-2014 Council term to support that vision. The two priorities identified as Council's top priorities were the revitalization of Downtown Penticton and waterfront enhancement.

What follows is a snapshot of what staff has completed in the third quarter of 2014 relating to work accomplished on Council's strategic priorities.

Analysis

This quarter, I am pleased to provide Council with an overview of achievements from the 2011-2014 term in addition to the regular quarterly progress report on strategic priorities. Staff reviewed work plans from the last three years to showcase a selection of accomplishments, which are a testament to what can be done when an organization focuses on outcomes that enhance the lives of their customers. A few of the highlights unearthed include:

- Recreation Department reduced public subsidy over $3 million in the last three years when compared to 2009 levels with the old Penticton Community Centre.
- South Okanagan Events Centre generates equivalent of 368 jobs and generates an estimated annual economic activity of $33.9 million – while reducing subsidy by $2.1 million in last two years when compared with 2009.
- Penticton's successful bid to host the BC Winter Games in 2016, which stands to generate $1.7 million in economic activity.
- Five new off-leash dog parks are opened in the community to expand facilities for community dog lovers to six.

- School traffic calming supports three different school communities walk to class safely by addressing speed and traffic flow concerns.
- Skaha Lake Park is transformed with tree planting program, first natural-built playground of Discovery Park and the Skaha Lake Outdoor Fitness Park.
- Accessibility improvements throughout the community including beach access ramps, specially designed picnic tables that accommodate
- Lakawanna Tennis Courts receive surface upgrades completed, encouraging more use and activity.
- LED streetlight conversion program saves 50% more energy along Skaha Lake.
- Westminster Substation upgrade is underway to enhance Electric Utility capacity for business continuity.

Q3 was a transitional period for work on Council's Strategic Priorities, where projects shifted into their second phases to continue the success already achieved.

Downtown Revitalization

Building on the momentum from the first phase of Downtown Revitalization, I am happy to report that significant strides for the second phase of revitalization along Main Street have been made.

While the first revitalization project in our commercial core was underway, significant consultation was being held with Main Street land and business owners in the 100 and 200 blocks to provide conceptual drawings and preliminary engineering designs. Hundreds of meetings were held with stakeholders, ensuring that concepts were thoroughly reviewed and concerns were identified and proactively addressed. The project proposes new widened sidewalks, lamp standards, trees and energy-efficient lighting, in addition to improvements to the underground infrastructure, irrigation lines and electrical infrastructure that will allow the popular Downtown Market and Penticton Farmers Market access to power during events – offering even more economic opportunity to local merchants and businesses. After hearing feedback on concerns over parking, staff conducted analysis that showed that the widened sidewalk design will actually create additional parking spaces along Main Street as sidewalk cafes can now be accommodated as part of storefront uses. These sessions helped refine the streetscape designs, allowing staff to develop more finalized concepts for the area.

At the same time, additional consultation meetings were held with stakeholders of the 100 block North Green park space. A variety of event organizers were consulted on preliminary design concepts that arose from the charrettes held in spring, to ensure concepts are workable going forward. Phasing and funding options have been mapped out, and grant applications are currently underway.

Additional services supported Downtown Revitalization through increased vibrancy at events. The City and B.C. Transit partnered to expand public transit service during Peachfest, which the public reported high satisfaction with. Route #5 Main Street to Skaha Lake was modified to better serve residents and visitors attending the festival, with evening hours extended until midnight. This initiative enabled greater vibrancy in the community for a longer period of time, being inclusive of those who typically cannot partake in late-night activities due to transportation limitations.

For more information about achievements of Downtown revitalization and plans to come, the public is welcome to visit www.penticton.ca/downtown.

Waterfront Enhancement

While the new Okanagan Lake walkway extends to The Peach on Lakeshore Drive, the walkway around Rotary Park that leads to Kiwanis Pier is in need of replacement. Significant progress was made in the third quarter as a result of feedback from public consultation sessions. This allowed for further refinement of designs, which finalized tender documents to select a construction firm to get shovels in the ground as soon as possible.

On the other end of the walkway, the public was invited to provide comment on what they valued or supported as elements to the improvements at the proposed SS Sicamous Heritage Park. Even after the public input, the discussions continued with stakeholders. Respondents seemed to favour several concepts like a First Nations cultural facility that celebrates indigenous people's heritage in the Okanagan, enhancement of the rock lookout or a pier, enhancing pedestrian movements with pathways and connections, and some form of entry feature or plaza. The public also responded favourably to parking and road enhancements, to ensure safe and efficient vehicle movement, pedestrians and cyclists. This helped the project team to further refine the concepts, which were posted to the website for additional comment and review at public sessions. These comments will be incorporated into the master plan for the area, scheduled to be finalized this fall.

The Marina Way Lookout project opened in August – yet another achievement in Council's waterfront enhancement strategic priority. The project vision was to transform an abandoned peninsula formerly used as a Canadian National Railway loading dock into a naturalized park area that restores Okanagan Lake riparian habitat, improves urban forest and enhances the environment. Habitat was restored in the environmentally sensitive area just east of the Penticton Art Gallery. Environmental restoration included creating an additional 1,000 square metres of habitat with the planting of 30 trees and 300 shrubs indigenous to the area, including cottonwood, aspen, dogwood and wild rose. Undesirable and invasive plant species were also removed.

The space was also transformed into a passive "lookout" space to enhance the experience of enjoying the lake view. A gravel path that connects with the Okanagan Lake walkway leads out to the end of the breakwater where a platform has been installed, allowing visitors a clear vantage point of Okanagan Lake. New benches were also installed, and parking was maintained. The heritage of the area is also celebrated, as the location served as the primary gateway to accessing the original townsite, just to the east of Penticton Creek. A section of rail lines have been installed to mark the significance of the area, and interpretive signs will be established in the coming months.

The public can find out more on Waterfront enhancement progress at www.penticton.ca/waterfront.

Attachments

Council Strategic Priorities and Staff Department Work Plans, updated to reflect activities of Q3.

Term Review 2011-2014.

Respectfully submitted,

Annette Antoniak
City Manager

Q3 Work Plan for Council Strategic Priorities for 2014

Activity	Action	Timeline	Progress ($ %)
Downtown			
Downtown Parking Program CAP211-001 / 002 / 003	~~Completion of City Wide Parking Program~~ Downtown Parking Enhancements / Technology	Complete 2014 – Q4	$175,000 ($65,000) 45%
Downtown Revitalization **Martin Street & Westminster Avenue** CAP172	~~Detail Design~~ ~~Tender Construction of the Project~~ ~~Close Tender~~ ~~Award Tender~~ ~~Commence Construction~~ ~~Complete Construction~~	Complete Complete Complete Complete Complete Complete	$1,266,865 ($1,250,489) 100%
Westminster / Martin - communications CAP182-002	Kick-off celebration Scrim Business toolkit Proactive communications with businesses Respond to calls for service Project wrap-up celebration Project assessment Prepare for upcoming revitalization project	Complete Complete Complete Complete Complete Complete Complete Q3-Q4	$30,000 ($18,000) 60%
Main Street – Consultation / Community Engagement CAP309-028	Main Street Landowner Meetings Public Information Sessions – Main Street Design	Detail design with 100/200 block owners Complete	$45,000 ($15,000) 75%
Main Street - North & South Green – Design & Engineering CAP418-001	~~RFP~~ ~~Landowner Consultation~~ ~~Creation of Design Options~~ ~~Public Consultation~~ Concept Finalization and Costing Examination of Funding Options Local Improvement Bylaw Detail Design	Complete Complete Complete Complete Q3 - underway Q3 - underway Q3 - underway Q3-Q4	$125,000 ($40,000) 75%
Main Street Design CAP417	~~Landowner Consultation~~ ~~Creation of Design Options~~ ~~Public Consultation~~	Complete Complete Complete	$400,000 ($5,490) 1.4%

Q3 Work Plan for Council Strategic Priorities for 2014

	~~Concept Finalization and Costing~~ Examination of Funding Options Local Improvement Bylaw Detail Design	Complete Q3 Q4 - underway Q3 - underway Q4 – Q1 2015	
Main Street – 400 Block Breezeway / Canopy CAP	Construction of canopy / walkway	Q4 – discussion underway	$8,000 ($) 0% Landowner discussions ongoing to finalise easement
Penticton Creek – HCTF Grant CAP303-002	~~Award Consulting Work~~ Stantec Consulting to complete workplan and creek design Landowner Consultation Community Consultation Detailed Design 2nd Year of Project to commence once Stantec work completed	Complete Q2 2014- Underway Q3 2014 Q3/Q4 2014 Q4 2014 / Q1 2015 Q1/Q2 2015 Q1 2015	$63,680 (1st Year Funding – extended) ($) – Stantec contract commenced 60% $85,000 (2nd year funding – approved) Discussion underway as to next steps
Waterfront – Okanagan Lake			
Waterfront Okanagan Lake East – Lease Consolidation and Development Proposal Process	Completion of Lease Consolidation Expression of Interest Process to seek interest from developers Request for Proposals from short list of interested developers Contract negotiation Completion of OCP, Zoning and DP changes Commence site development	Q4 Q4 Q4 Q4 Q1 2015 Q2 2015	N/A
Waterfront Okanagan Lake West – SS Sicamous Master Plan CAP421	~~RFQ~~ ~~Award of consulting work~~ Community Consultation Draft Master Plan Final Master Plan	Complete Complete Q2-Q3 Q4 2015	$150,000 ($96,356) 64%

Q3 Work Plan for Council Strategic Priorities for 2014

West Okanagan Lake Waterfront **Lakeshore Drive Improvements** CAP168	~~Phase 2 Construction Restart~~ ~~Phase 2 Construction Completion (contract closure in progress – holdback to be released)~~	Complete Complete	$2,342,222 ($2,267,465) 100%
West Okanagan Lake Waterfront **Parking Lane Asphalt Rehabilitation** CAP309	~~Detail Design~~ ~~Construction~~	Complete Complete	$135,000 ($154,000) 114%
West Okanagan Lake Waterfront **Peach Plaza** CAP419	~~Concept Finalization & Public Consultation~~ ~~Detail Design~~ Tender Construction of the Project Close Tender Award Tender Commence Construction Complete Construction	Complete Complete ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q3~~ Q4 Q4 Q2 2015	$265,000 ($5,962) 2.3%
West Okanagan Lake Waterfront **Rotary Park Walkway** CAP420	~~Concept Finalization & Public Consultation~~ ~~Detail Design~~ Tender Construction of the Project Close Tender Award Tender Commence Construction Complete Construction	Complete Complete ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q4~~ Q2 2015	$396,000 ($53,253) 13.5%
Rose Garden Upgrades – Donation Dependant CAP113-001 TO CAP113-003	~~Solicit and Consolidate Donations~~ ~~Design~~ ~~Site Clean Up – PIB Consultation~~ RFP or Quote – Gazebo Construction Opening Ceremony	Complete Q3 Complete Q3 Q4 Q4	$37,000 ($16,300) 44%
East Okanagan Lake Waterfront **Marina Way Look Out Park** CAP108-001 TO CAP108-003	~~Design~~ ~~Public / Council Consultation~~ Construction ~~Grand Opening Ceremony~~	Complete Complete Q3 Complete	$109,000 ($81,000) 75%
Waterfront – Skaha Lake			
Skaha Park Green Gym CAP112-001 TO CAP112-003	~~Grant Award~~ ~~Design~~ ~~Public Consultation~~	Complete Complete Complete	$5,900 ($5,400) 91%

Q3 Work Plan for Council Strategic Priorities for 2014

	~~RFP for Equipment~~ ~~Construction~~ Opening Ceremony	Complete Complete Complete	
Skaha Playground – Upgrade CAP105-001 TO CAP105-004	~~Letter to South Okanagan Children's Charity~~ ~~Budget Approval~~ ~~Plan and Concept approval~~ ~~Commitment from Charity~~ ~~Design~~ ~~Tender / RFP – Equipment~~ ~~Notification – Paper and Council~~ ~~Construction~~ ~~Grand Opening Ceremony~~	Complete Complete Complete Complete Complete Complete Complete Complete	$35,000 ($44,300) 126%
Waterfront Skaha Lake – **Marina Area Development CF**	Completion of Lease Consolidation ~~Expression of Interest Process to seek interest from developers~~ ~~Request for Proposals from short list of interested developers~~ ~~Term Sheet Contract negotiation~~ Final Agreement Complete Completion of OCP, Zoning and DP changes Commence site development	Q3 Complete Complete Complete Q3 Q4 2015 Q1	N/A

Q3 Work Plan for Communications for 2014

Activity	Action	Timeline	Progress ($ %)
Waterfront Enhancement	Okanagan completion project	Q1-Q2	Complete
	Okanagan project showcase	Q1-Q2	Complete
	Skaha – opening for green gym/fitness park	Q1-Q2	Complete
	Skaha – opening for Discovery Park	Q1-Q2	Complete
	Skaha – project planning	Q1	Complete
	Skaha – project consultation	Q4-ongoing	In progress
	Webpage updates	Q1-Q4	In progress
Downtown Revitalization	Revite toolkit for businesses	Q1	Complete
	Revite comms plan execution	Q1-Q2	Complete
	Revite comms plan assessment	Q2-Q3	Complete
	Main Street consultation	Q1-Q2	Complete
	Penticton Creek consultation	Q4-ongoing	
	Webpage updates	Q1-Q4	In progress
Special projects	Economic Development – Home Base Penticton	Q1	Complete
	Economic Development – Chamber program	Q1-Q2	Complete
	Economic Development – Tri-training maps	Q2-Q3	In progress
	Economic Development – Virtual work campaign	Q2-Q3	
	Economic Development – EIZ campaign	Q3-Q4	In progress
	Economic Development – Project Entrepreneur campaign	Q3-Q4	
	Economic Development – Advertising opportunities	Q1-4	In progress
	Finance – grant application package	Q2-Q4	Complete
	Finance – budget	Q3-Q4	In progress
	Finance – E-bill campaign	Q1-Q3	In progress
	Corporate – General Election	Q3-Q4	In progress
	Public Works – MMBC education and awareness	Q2	Complete
	Bylaw Services materials – review + assessment	Q2-Q4	In progress
	Bylaw Services materials – build and roll-out	Q4-ongoing	In progress
Brand and visual identity	Finalize Visual Identity Manual	Q1	Complete
	Assess organizational needs, develop priorities	Q1	Complete
	Beta test – sample projects	Q1	Complete
	Corporate suite template development	Q1	Complete
	Corporate suite roll-out	Q1	Complete

Q3 Work Plan for Communications for 2014

	Corporate suite training	Q1-Q2	Complete
	Trade show material – design + production	Q1-Q2	In progress
	Marketing suite template development	Q1-2	Complete
	Marketing suite roll-out – internal	Q2	Complete
	Marketing suite roll-out – external	Q2	Complete
	Marketing suite training	Q2	Complete
	Financial suite assessment	Q3-Q4	In progress
	Financial suite template development	Q3-Q4	
	E-forms	Q3-Q4	
	Assist Purchasing with RFP for printing services	Q2	Complete
	Identify priorities for physical items – signage, wayfinding, fleet, etc.	Q2-Q3	Complete
	Begin design for physical items	Q4-ongoing	In progress
Advertising	Book, review City Page ads	Q1-Q4	In progress
	Book newspaper ads as required	Q1-Q4	In progress
	Book radio spots as required	Q1-Q4	In progress
	Book social media promotions as required	Q2-Q4	In progress
	Primary/secondary advertising supply contracts	Q1-Q2	Complete
	Advertising Policy review	Q2-Q4	
	Advertising Procedure review	Q2-Q4	In progress
Media relations	News releases	Q1-Q4	In progress
	Backgrounders, fact sheets, bios	Q1-Q4	In progress
	Media advisories	Q1-Q4	In progress
	Media Room upgrades	Q1-Q4	
	Media requests	Q1-Q4	In progress
	Regional media distribution list	Q2	Complete
Community relations	Council Highlights	Q1-Q4	In progress
	Messages from the mayor	Q1-Q4	In progress
	Speeches/talking points	Q1-Q4	In progress
	Proclamations text	Q1-Q4	In progress
	Stakeholder email list maintenance	Q1-Q4	In progress
	Canada Anti-Spam Legislation – internal education	Q2-Q3	Complete
	Canada Anti-Spam Legislation - consent process	Q2-Q3	Complete
	Meetings with stakeholders	Q1-Q4	In progress
Online resources	Website – content monitoring	Q1-Q4	In progress
	Website – navigation plan for Business	Q2-Q4	In progress

Q3 Work Plan for Communications for 2014

	Website – navigation execution for Business	Q2-Q4	
	E-newsletter – website infrastructure, e-form	Q4-ongoing	In progress
	E-newsletter – develop design, test technology	Q4-ongoing	In progress
	E-newsletter – database development	Q4-ongoing	
	E-newsletter – beta testing	Q4-ongoing	
	E-newsletter – launch, promotion	Q4-ongoing	
	Social media – live-tweet Council meetings	Q1-Q4	In progress
	Social media – assessment of networks, benchmarking	Q2-Q4	
	Social media – plan	Q4-ongoing	
	Social media – promotion	Q4-ongoing	In progress
Internal	Pension contribution updates	Q2	Complete
	Benestats	Q4-ongoing	
	Recruitment suite package	Q2-Q4	In progress
	PFD communications plan – review + assessment	Q4	
	PFD communications plan – completion	Q3-Q4	Deferred to 2015
Publications	Annual Report – schedules, set deadlines	Q1	Complete
	Annual Report – redesign with new brand	Q2	Complete
	Annual Report – Content development, collection	Q2	Complete
	Annual Report – Supplier for production, binding	Q2	Complete
	Annual Report – Advertise	Q2	Complete
	Annual Report – Report to Council, post online	Q2	Complete
	Utility newsletter – 12 print, online, e-bill editions	Q1-Q4	In progress
	Utility newsletter – redesign to new brand standards	Q2	Complete
	Utility newsletter – RFP for print contract pricing	Q2	Complete
	Tax notice insert – redesign to new brand standards	Q2	Complete
	Tax notice insert – production and provision for Collections	Q2	Complete
Strategic planning	Aggregate assessments and requests	Q1-Q3	Complete
	Articulate long-term vision based on communication pillars	Q2-Q4	In progress
	Identify short term projects	Q3-Q4	In progress
	Develop 2015 budget	Q3-Q4	In progress
Emergency planning	Functional Communications Plan	Q2	Complete
	Seasonal message updates	Q1-Q2	Complete
	Contact assimilation	Q2	Complete
	Annual update of emergency backups	Q2	Complete
Issues management	Assist Mayor, Council, CAO, managers and staff with issues arising	Q1-4	Ongoing

Q3 Work Plan for Corporate Services for 2014

Activity	Action	Timeline	Progress ($ %)
Council Meetings	Review staff reports, agenda preparation, minutes and Council follow up 6 Regular or Special Council Meetings held 8 In-Camera Meetings held 2 Comm. Of the Whole held	2014-Q3	Complete and ongoing
Committee Meeting (13 City Committees)	Same process as Council Meetings 20 Committee Meetings held	2014-Q3	Complete and ongoing
Staff Leadership Meetings	Biweekly preparation of agendas, minute taking and preparing/tracking action items	2014-Q3	Complete and on-going
Council Follow Up	Follow up on Council directives and tracking actions and completion dates in database including drafting routine letters and correspondence	2014-Q3	Complete and on-going
City Page Advertising	Overseeing the content of the City Page in the Herald and the Western Newspapers 31 City Page Ads Prepared	2014-Q3	Complete and on-going
Freedom of Information and Protection of Privacy	Processed FOI Requests - 11	2014-Q3	Complete and on-going
Proclamations/Invitations/Hosting of Special Visits	Processed 3 proclamations 32 invitations/special visits 0 certificates	2014-Q3	Complete and on-going
Bylaw & Permits (drafting, processing)	Bylaws - 11	2014-Q3	Complete and on-going
Conduct research on behalf of the City regarding bylaws, policies, legislation, interpretation and authority	Processed searches	2014-Q3	Complete and on-going
Policy Index	Creating a complete and searchable index	Q1-Q4	On-going
Bylaw Index	Creating a detailed and searchable index	Q1-Q4	On-going
Administrative support for Mayor, Council, and City Manager	Drafting of correspondence, scheduling of calendars, event preparation, and research	Q1-Q4	On-going
Vet agreements and arrange for signatures of all City agreements, covenants, contracts, etc.	Following each Council meeting		

Q3 Work Plan for Corporate Services for 2014

Oversee the City's General In-box and respond as appropriate	Daily	Q1 – Q4	Complete and on-going
Arrange Council attendance at conferences including SILGA, UBCM, GCM	Making arrangements, registration, preparing briefing notes, binder preparation and follow up	FCM – Q1 SILGA - Q2 UBCM - Q3	Complete Complete
UBCM Meetings	Arrange meetings, coordinate schedules, produce binders, coordinate briefing notes for Minister's meetings	Q3	10 Meetings requested Briefing notes in progress
Daily Issues Management and response to various queries from the public and staff	Daily	On-Going	Complete and on-going
Election 2014	Prepare documents, advertising, bylaw amendment Training, Advance Polls, Election Day, Election Report Receive candidate campaign financing disclosure statements	2014-Q2/Q3 2014-Q4 2015-Q1	Bylaw amendment completed Documents completed Statutory advertising prepped Facebook/Twitter prepped and in-progress EO hiring in progress
RMS **Electronic Records – RFP**	Proof of concept requested	2015	
RMS **Archives – determine space needs, document destruction**	Document destruction in archives, evaluate retention schedules	2014-Q1/Q2	In-progress
RMS **Training staff**	Initial training provided by contractor, ongoing by corporate services	2015-Q1	
Council Orientation Manuals	Review previous materials, update, develop new template, produce binders by Mid November	2014-Q2 – Q4	

Q3 Work Plan for Development Services for 2014

Activity	Action	Timeline	Progress ($ %)
Downtown Strategic Priority	Downtown Parking Program Main Street consultation and design North & South Green Design Penticton Creek Rehabilitation Project 400 Block of Main Street - Breezeway	Ongoing	See Strategic Priority Spreadsheet for update
Outstanding Customer Service	Implementation of City Hall Renovations Increase productivity Identify areas to innovatively reduce regulation	Ongoing	Development Services Staff moved to 1st floor of City Hall Work required to get used to new space and obtain tools required to complete efficiencies.
Staff Engagement	Recognize staff for outstanding work and attitude Team Building Professional Development	Ongoing	Work with development services staff to find solutions to issues that arise during the year. Support professional development of staff to increase knowledge and benefit our customers
Alignment with Economic Development	Work with Coty Economic Development Officer to ensure proactive approach to new business in the community.	Ongoing	Working closed with economic development and alignment of all department workplan with Economic Development priorities
Planning Department	Current Planning Applications Downtown Plan implementation	Ongoing Ongoing	Very busy year so far. Busiest September on record Main Street Design completed and petition

Q3 Work Plan for Development Services for 2014

			process started
	Upper Wiltse Neighbourhood Plan. Penticton Creek Restoration Implementation Plan for Corporate Climate Action Planning work	Adopted Ongoing Ongoing	 Carbon sequestration project to Council Fall
Land Management Department	Renew expired Leases at market rates. Register all leases and Licences. Licence the identified encroachments on City property and identify additional encroachments; Identify surplus land inventory for review.	Ongoing	New contact assistant hired in Q1 2014, positive results in increased productivity for department seen straight away. Projects ongoing throughout 2014.
Building Department	Inspections and Permits (Q3) • Permits issued = 184 • Inspections = 521 • Files closed = 112 • Cross Conn. Surveys and Inspections=66 Engaged Water Conservation public education and enforcement. Completion of Water Conservation education/enf. program – joint info session with RDOS at farmers market. Updating of policy and procedure manual Re-branding of forms and public bulletins ongoing. Continuation of closure of old permits. Increase action on Bylaw enforcement. Filled 3rd Inspector posting. (3month probation) • Relief fill in for Bldg-3 position for Stress leave.	Ongoing	Cross Connection Emergency Plan Policy rewrite – for final review Customer Service enhancements ongoing Planning Building Code Change workshops in Conjunction with City of Kelowna and RDOS for November/Dec. To engage option with IT department for online plumbing and heating applications. Continued high activity with building activity

Q3 Work Plan for Development Services for 2014

	Continued enforcement of Vacant Buildings Cross training with other clerks for improved vacation coverage.		seen in Q3. Building Bylaw Rewrite completion deferred to Winter, final review with Development Services Committee in early 2015
Bylaw Department	Hiring a Bylaw Enforcement Supervisor Completion of Downtown Parking Program Completion of parking violation educational hand out Joint graffiti partnership with D.P.A. and R.C.M.P. Initial review of Traffic Bylaw Initial review of Policy & Procedure Manual	Ongoing	Supervisor hired in Q1 2014 Implementation of Parking Program Draft policy / procedure manual completed Q3 2014 – under review Bylaw team functions enhanced with new Supervisor position
Business Licence Department	Business Licences (YTD) • New & Amendments = 679 • Non-Profit Registrations = 86 • Liquor Licence Requests = 40 (includes special events) • Sidewalk Café & Sales permits. = 20 • Bylaw Disputes = 81 (7 to Adjudication) Cross training with other clerks for improved vacation coverage. Initial Review of revamping Business Licence processing and webpage information: • Rebranded application forms • Application to engage Provincial OneStop program (coordinating with Economic Dev. & IT) • Initiated online application, changes and renewals via BL webpage. (coordinating with IT) • Initiated online business directory via BL webpage. (coor. with IT)	Ongoing	Continue testing with IT Department for of on-line options. Nov/Dec roll out. Prepare workshop and public announcements of BL changes and online options Nov/Dec. Preparing procedures manual and maternity relief for early 2015. Waiting on LCLB for additional policy changes in Nov/Dec regarding changes to City Liquor review procedures.

Q3 Work Plan for Electric Utility Department for 2014

Capital – Capacity and Backup Projects			
Activity	Action	Timeline	Progress ($,%,Comp)
Pole Replacements CAP229	Overhead pole replacements City wide	Q1–Q4	$104,000 ($42,146) 38%
OH System - Porcelain Arrestor Replacement CAP231	Determine replacement area Order material Arrestor replacement	Incorporated into Conversion program	$110,000 ($0) 0%
Demand Totalizing Metering CAP242	~~Prepare RFP~~ ~~Purchase material~~ Installation and commissioning	Complete Complete Q4	$110,000 ($31,460) 29%
Transformer Changes CAP244	Replace transformers as required for new services	Customer Dependant	$400,000 ($34,463) 9%
Meter Conversions Program - AMR CAP247	Replace all poly-phase electromechanical meters (130 remaining @ approx. 1/day)	100 units by Q4 Finalize in Q4 2015	$115,000 ($66,737) 58%
SCADA Upgrades CAP253	~~Prepare Expression of Interest~~ ~~Prepare RFP~~ ~~Review bids & award RFP~~ ~~Purchase material~~ Installation and commissioning	Complete Complete Complete Complete Q4	$112,894 ($122,860) 108%
PCB - Test, Record, Store, Dispose CAP254	~~Implement Compliance Action Plan~~ ~~Build new triage area~~ Sample In-Service units Replace Contaminated units	Complete Complete Complete Q4	$102,000 ($70,308) 69%
Step Transformer – Dawson CAP258	~~Receive Material~~ ~~Train staff & Dev. Operating Procedures~~ ~~Energize Unit~~ Issue Final Payment	Complete Complete Complete Q4	$417,663 ($346,711) 83%
New Tie – R6/R32 CAP263	As R5, R6, R32 & R33 are converted – transfer loads to balance system Pending Westminster Sub	Q4 Q2 2015	$144,640 ($0) 0%

Q3 Work Plan for Electric Utility Department for 2014

Convert Feeder R5 to 12kV CAP268	~~Replace transformers & hardware~~ Plan conversion stages Feeder conversion – Pending Westminster	Complete Q3 Q2 2015	$451,659 ($1,082) 1%
Convert Feeder R6 to 12kV CAP269	~~Replace transformers & hardware~~ Plan conversion stages Feeder conversion	Complete Q3 Q2 2015	$578,861 ($15,471) 3%
Westminster Substation 12KV Upgrade CAP271	~~Resolve Dispute with FBC~~ Design & Eng – Station Design & Eng – Distribution Construction Commissioning	Complete Q2-Q3 Q2-Q3 Q3-Q3 2015 Q3 2015	$5,928,000 ($72,501) 1%
Convert Feeder R32 to 12kv CAP274	~~Scope of Work~~ Acquire Material Convert feeder – Pending Westminster Sub.	Complete Q2-Q4 Q2 2015	$718,500 ($374,567) 52%
Convert Feeder R33 to 12kv CAP275	~~Scope of Work~~ Acquire Material Convert feeder – Pending Westminster Sub	Complete Q3 Q2 2015	$718,500 ($203,300) ~~28%~~
Volt. Regulator – Hudson CAP319	~~Order Material~~ ~~Complete installation~~	Complete Complete	$211,950 ($93,612) ~~44%~~
Underground Cable Replacement Program CAP325	Determine Locations Order Material Complete installation	Deferred to 2019	$525,000 ($0) ~~0%~~

Q3 Work Plan for Electric Utility Department for 2014

Capital - Base			
Activity	Action	Timeline	Progress ($,%,Comp)
LED Conversion Program CAP192	~~Investigate & select locations~~ ~~Order material~~ ~~Install LED Lights~~	Complete Complete Complete	$60,000 ($13,829) 23%
Audible Signals CAP195	~~Investigate & select locations~~ ~~Order material~~ Install audible signals	Q2 Q2 Q4	$12,500 ($5,832) 47%
Traffic Controller Installation CAP196	Investigate and select locations Order material Install Controllers	Q3 Q3 Q4	$20,000 ($0) 0%
UPS Installations CAP197	~~Investigate & select locations~~ ~~Order material~~ Install UPS modules	Complete Complete Q3	$31,500 ($13,364) 42%

Operating – Special Projects			
Activity	Action	Timeline	Progress ($,%,Comp)
Electrical Building Design CAP323	~~Determine Building Size and Location~~ Determine Building Design and Cost Text	Complete Q4 – Deferred to 2015/2016	$60,950 ($8,200) 13%
Pole Contact Agreements	~~Complete negotiations with Shaw and Telus~~ ~~Agreements to Council for considerations and execution~~ ~~Budget for revised revenue stream~~	Complete Complete Complete	N/A N/A 100%

Q3 Work Plan for Engineering for 2014

Engineering - Design			
Activity	Action	Timeline	Progress ($ %)
West Okanagan Lake Waterfront **Lakeshore Drive Improvements** CAP168	~~Phase 2 Construction Restart~~ ~~Phase 2 Construction Completion (contract closure in progress - holdback to be released)~~	Complete Complete	$2,342,222 ($2,267,465) 100%
West Okanagan Lake Waterfront **Parking Lane Asphalt Rehabilitation** CAP309	~~Detail Design~~ ~~Construction~~	Complete Complete	$135,000 ($154,000) 114%
West Okanagan Lake Waterfront **Peach Plaza** CAP419	~~Concept Finalization & Public Consultation~~ ~~Detail Design~~ Tender Construction of the Project Close Tender Award Tender Commence Construction Complete Construction	Complete Complete ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q4~~ Q2 2015	$265,000 ($5,962) 2.3%
West Okanagan Lake Waterfront **Rotary Park Walkway** CAP420	~~Concept Finalization & Public Consultation~~ ~~Detail Design~~ Tender Construction of the Project Close Tender Award Tender Commence Construction Complete Construction	Complete Complete ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q3~~ Q4 ~~Q4~~ Q2 2015	$396,000 ($53,253) 13.5%
Downtown Revitalization **Martin Street & Westminster Avenue** CAP172	~~Detail Design~~ ~~Tender Construction of the Project~~ ~~Close Tender~~ ~~Award Tender~~ ~~Commence Construction~~ ~~Complete Construction~~	Complete Complete Complete Complete Complete Complete	$1,266,865 ($1,250,489) 100%
Downtown Revitalization **Main Street** CAP417	~~Landowner Consultation~~ ~~Creation of Design Options~~ ~~Public Consultation~~ ~~Concept Finalization and Costing~~ Examination of Funding Options Local Improvement Bylaw	Complete Complete Complete Complete ~~Q3~~ Q4 ~~Q3~~ Q4	$400,000 ($5,490) 1.4%

Q3 Work Plan for Engineering for 2014

	Borrowing Bylaw or Referendum Detail Design	Q3 – Q4 Q4 – Q1 2015	
Aging Water Infrastructure Replacement CAP409	~~Detail Design~~ ~~Tender Construction of the Project~~ ~~Close Tender~~ ~~Award Tender~~ ~~Commence Construction~~ Complete Construction	Complete Complete Complete Complete Complete Q4	$401,000 ($85,616) 21.4%
50mm & 100mm Watermain Upgrades CAP408	~~Detail Design~~ ~~Tender Construction of the Project~~ ~~Close Tender~~ ~~Award Tender~~ ~~Commence Construction~~ Complete Construction	Complete Complete Complete Complete Complete Q4	$938,000 ($803,402) 85.7%
Sidewalks, Curb, & Gutters CAP414	~~Detail Design~~ ~~Tender Construction of the Project~~ ~~Close Tender~~ ~~Award Tender~~ ~~Commence Construction~~ Complete Construction	Complete Complete Complete Complete Complete Q4	$352,400 ($155,512) 44%
Industrial Avenue Reconstruction CAP404 - 406	~~Detail Design~~ ~~Tender Construction of the Project~~ ~~Close Tender~~ ~~Award Tender~~ Commence Construction Complete Construction	Complete Complete Complete Complete ~~Q3~~ Q4 Q4 (Q1/Q2 2015)	$1,938,000 ($11,740) 1%
Miscellaneous Storm Projects & Storm Runoff Remediation CAP411	~~Detail Design~~ ~~Tender Construction of the Project~~ ~~Close Tender~~ ~~Award Tender~~ ~~Commence Construction~~ Complete Construction	Complete Complete Complete Complete Complete Q4	$178,000 ($33,262) 18.7%

Q3 Work Plan for Engineering for 2014

Bike Network Design and Implementation CAP412	~~Concept Finalization & Public Consultation~~ Detail Design Commence Construction Complete Construction	Complete Q3 On hold 2015 2015	$145,000 ($10,595) 7.3%
Pedestrian Crosswalk Installation, Traffic Calming & Intersection Improvements CAP416	~~Concept Finalization & Public Consultation~~ ~~Detail Design~~ ~~Commence Construction~~ Complete Construction (Adding Uplands School)	Complete Complete Complete ~~Q3~~ Q4	$54,000 ($38,588) 71.5%
Corry Place Design CAP407	~~Concept Finalization & Public Consultation~~ Detail Design Develop Local Improvement Strategy	Complete ~~Q3~~ Q4 Q4	$45,000 ($6,364) 1.4%
Irrigation System Cost Recovery Strategy CAP410	~~Engage Consultant~~ Complete report	Complete ~~Q3~~ Q4	$30,000 ($3,710) 12.4%
Storm Drainage Master Plan Update CAP400	Engage Consultant Complete report	~~Q2~~ Q4 ~~Q3~~ Q2 2015	$110,000 ($0) 0%
Asset Replacement Plans for Aging Water and Sanitary Mains CAP401 – CAP402	Engage Consultant Complete report	Q2 On hold pending asset management strategy 2015	$50,000 ($0) 0%

Engineering - AWWTP			
Activity	**Action**	**Timeline**	**Progress ($ %)**
Equipment Replacement			
1. **Replace ½ UV Lamps** CAP345	~~RFQ & Purchase~~ ~~RFQ & Contractor complete work~~	Complete Complete	$75,000 ($77,159) 103%
2. **Re-roof DAF & Old Screens Bldg.** CAP346	~~RFQ & Purchase~~	Complete	$45,000 ($39,000) 85%
3. **Purchase spare RAS pump** CAP348	~~RFQ & Purchase~~	Complete	$13,000 ($11,591) 89%
4. **Purchase spare recycle pump** CAP349	~~RFQ & Purchase~~	Complete	$25,000 ($25,904) 103%

Q3 Work Plan for Engineering for 2014

5. **Replace obsolete gas detectors** CAP350	~~RFQ, Purchase and install (WWTP Staff)~~	Complete	$6,000 ($5,614) 94%
6. **Replace 600 mm butterfly valve** CAP352	~~RFQ, Purchase and install (WWTP Staff)~~	Complete	$20,000 ($26,419) 130%
7. **Install 3 VFD's North Irr.** CAP353	~~Installation by OEM and WWTP Staff~~	Complete	$30,000 ($33,030) 110%
8. **Install new gear box Secondary Clarifier** CAP347	RFQ and install (WWTP Staff)	Complete	$80,000 ($77,489) 97%
9. **Re-commission old press polymer system** CAP354	~~Parks Activity~~	Q4	$22,500 ($15,412) 69%
10. **Green Buffer West Hwy 97** CAP351		Complete	$12,500 ($8,185) 66%
Equipment Replacement for Lift Stations CAP355	RFP, Design, Pre-purchase, Tender & Integration (WWTP Electrician & Contractor)	Q4	$180,000 ($69,875) 38%
Screw Pump Replacement CAP129	~~Tender~~ ~~Install (Contractor)~~	Complete Complete	$300,000 ($277,622) 100%
Fermenter Upgrades CAP356	~~Pre design~~ Detail Design (50% mark) Tender Commence Construction Complete Construction	Complete Q3 (50% mark completed) Q4 Q1 (2015) Q2-Q3 (2015)	$2,120,000 ($10,572) 1%

Engineering - WTP			
Activity	**Action**	**Timeline**	**Progress ($ %)**
Reservoir Mixing Improvements Chlorine Residual Monitoring within distribution CAP357	~~Purchase materials~~ Staff to install as time permits	Complete Q2-Q4	$25,000 ($7000) 28%
Penticton Avenue PRV Upgrade CAP358	Quotation Installation	Q3 Q4	$25,000 ($0)

Q3 Work Plan for Engineering for 2014

	Project will be carried forward to 2015	~~Q4~~ Q2 2015	0%
Water Treatment Plant Optimization • **Sendero Quality Monitoring** • **PLC / SCADA programming** • **Spare Caustic Pump** • **Misc. Upgrades** CAP359	Monitor and adjust flow or Chlorine Ongoing adjustments ~~Purchase spare pump~~ Ongoing as required	Q1-Q4 Q1-Q4 Complete Q1- Q4	$40,000 ($29,303) 73%
Replace PLC Equipment Water Plant CAP360	~~Equipment Purchase~~ ~~Equipment Installation~~	Complete Complete	$65,000 ($45575) 70%
PRV Performance Monitoring Distribution PRV Stations CAP361	Monitor as time permits	Q1- Q4	$31,000 ($0) 0%
Carmi Reservoir Altitude Valve and Bypass CAP362	~~Design~~ ~~Quotation~~ ~~Installation~~	Complete Complete Complete	$70,000 ($75,835) 108%
Equipment Replacement for Water Treatment Plant Lake Pump #6 Rebuild CAP363	~~Award Contract~~ Work scheduled	Complete Q4	$25,000 ($11500) 46%
Secondary Surge Equipment all pump stations CAP364	~~Purchase equipment~~ ~~Install~~	Q2 ~~Q2~~ Complete	$25,000 ($24,528) 98%
Okanagan Lake Intake Inspection CAP366	~~RFQ~~ Inspection scheduled	Complete Q4	$10,000 ($06030) 61%

Q3 Work Plan for Facilities for 2014

Activity	Action	Timeline	Progress ($ %)
McLaren Arena	Compressor Replacement	Q2	In progress ($25,000/15%)
	Ice Plant Upgrade	Q2	In progress ($30,000/15%)
City Hall	Resilient Flooring	Q2	In progress ($20,000/95%)
	Building Envelope Upgrades	Q1-Q2	In progress ($30,000/25%)
	City Hall Renovation CF	Q1	In progress (95% complete)
City Yards	Building Envelope Upgrades/Painting	Q2	In progress ($12,500)60%
	Truck Exhaust System	Q2	Not started ($14,000)
Library/Museum	Skylight Repairs	Q2	Complete ($4,500) 100%
	Lobby Upgrades	Q2	Complete ($55,000/100%)
	Repair Ceiling – Atkinson Gallery	Q1-Q2	Complete ($20,000/100%)
	Lobby Painting	Q1-Q2	Complete ($25,000/100%)
Community Centre	Washroom Upgrades	Q3	Complete ($15,000)
	Pool Tiles	Q3	In progress ($25,000) 30%
	Fitness Room Expansion	Q3	Carry forward revised scope ($10,000)
Fire Halls	**Fire Hall #1**		
	Washroom renovations upstairs	Q3	In progress ($35,000)50%
	Wood Window Repairs	Q3	Not started ($7,000)
	Infrared Scan	Q1	Complete ($7,000/100%)
	Fire Hall #2		
	Infrared Scan	Q1	Complete ($7,000/100%)
	Window Repair	Q3	($5,000)
	Emergency Measures Building -- Roof Replacement	Q1-Q2	Complete ($30,000/100%)
RCMP	Flooring Replacement	Q2	In progress ($30,000)60%)
Dog Control Facility	Build New Facility	Q1-Q4	In progress ($250,000/25%)

Q3 Work Plan for Accounting and General Finance for 2014

Activity	Action	Timeline	Progress ($ %)
Agresso implementation post mortem	This is an evaluation and documentation of the project including – i) An analysis of what went well and what didn't. ii) Tasks and procedures that have changed, been eliminated, or been added – including the impacts of all these changes had on efficiency and consumption of resources. iii) What needs to be done or considered going forward – such as full implementation of specific functionalities or additional modules. iv) Documentation and sign-off of the analysis.	May/June 2014	Project manager's final report complete and reviewed. City report and budget analysis still to be completed.
Agresso implementation post mortem	Documentation and report out on: i) Efficiencies already gained ii) Efficiencies to be quantified iii) Deficiencies to be quantified iv) Restructure department and functions of key staff	May/June 2014	In progress
2013 year end	Interim audit – examination of financial controls	Dec 2013	Complete
2013 year end	Year end audit – substantive testing and on-site attendance by auditors	April 2014	100%
2013 year end	Completion of PSAB compliant consolidated audited financial statements	May 15 2014	Complete
2013 year end	Public release of annual report	June 30 2014	Complete
2013 year end	Public release of SOFI report	July 2 2014	Complete
2013 year end	Remapping of Agresso Accounts to Caseware Financial Reporting Software	Feb/March 2014	Complete

Q3 Work Plan for Accounting and General Finance for 2014

Job descriptions	Re-define job descriptions of key staff – i) Chief Financial Officer ii) Controller iii) Accountant iv) Accounting clerk IV v) Accounting clerk III vi) Budget analyst	June/July 2014	 Not started Completed Not started Completed Completed Not started
Accountant recruitment	Demise Accounting Clerk IV position and Re-instate Accountant position. Complete recruitment process.	April 2014	Completed
Budget analyst position	Complete recruitment process. Define and document – i) Role ii) Procedures iii) Relationships to managers and departments iv) Go-forward budget process	 June 2014	50% In Progress In Progress In Progress In Progress
Budget application implementation	Complete implementation of Planner module in Agresso including – i) Project plan ii) Project scope iii) Statement of work iv) Establishment of a project team v) Implementation	May – November 2014	90%
Reporting	To implement a set of standard high-level reports for senior management	May – Dec 2014	5%

Q3 Work Plan for Fire Department - 2014

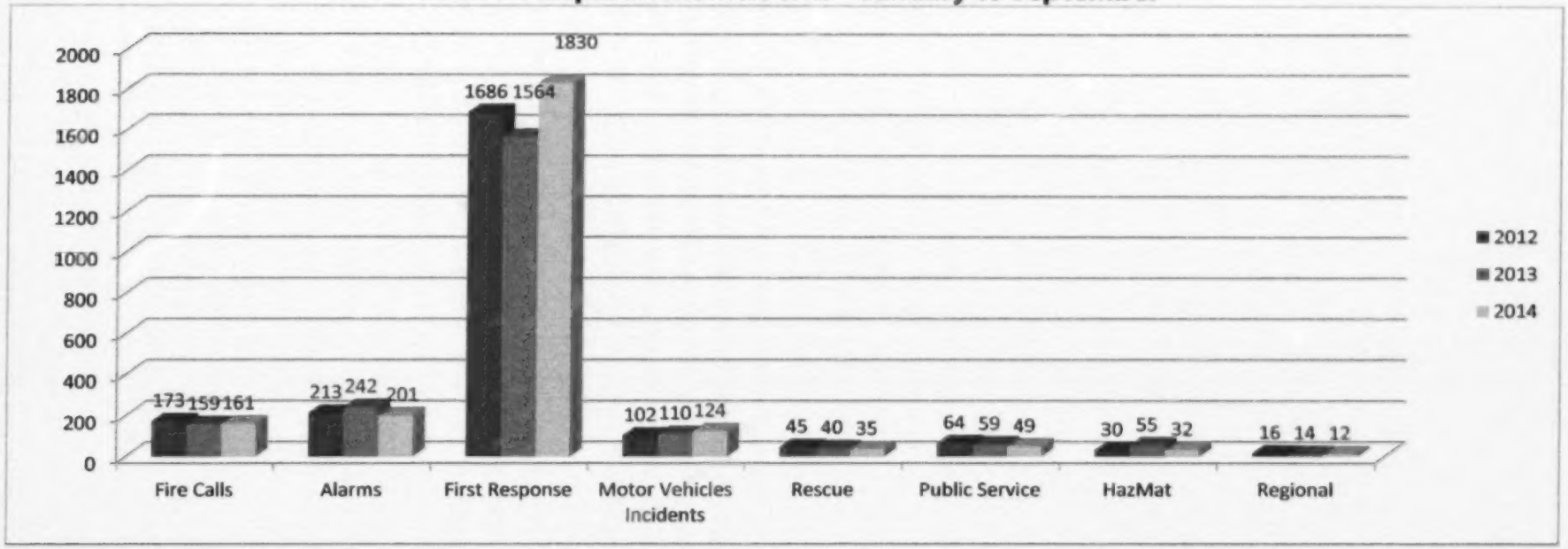
Activity	Action	Timeline	Progress ($ %)
Fire Administration	Revise Fire & Life Safety Bylaw – improve language and include Fees & Charges and Cost Recovery	Q1-Q4	In progress (80%)
	~~Frequency of Fire Inspections - Improve inspection frequency for High Hazard occupancies and reduce inspections for Low Risk occupancies.~~	Q1	Complete
	Fire Department Master Plan - Recommendations from the Fire Services Review will now form a Master Plan for the Fire Department	Q1-Q4	In progress (40%)
	Update Operational Guidelines - Change format and update Operational Guidelines	Q1-Q4	On Going
	~~Training Grounds – Business Case~~ ~~Training Manager – Business Case~~	Q1-Q2 Q1-Q2	Complete Complete
	Rescue Truck - Establish committee to prepare a RFP for the purchase of a new rescue truck	Q1-Q3	In progress (60%)
	Records management software – Work with Kelowna Fire Department to implement new software	Q4	
Fire Suppression	Company Inspections Pre-Plans	Q1 Q2 Q3 Q4	80 Inspections Completed 76 Inspections Completed 131 Inspections Completed On going
Fire Prevention	Fire Inspections Implement and maintain program to track deficiencies ~~Public education – Burn Awareness Week (February)~~ Public education – Fire Prevention Week (October)	Q1 Q2 Q3 Q4 Q1-Q4 Q1 Q4	480 Inspections Completed 380 Inspections Completed 308 Inspections Completed On going Complete
Emergency response	Fire calls and alarms First Responder medical calls Motor vehicle incidents Rescue calls HazMat incidents Regional Rescue	Q1-Q4 Q1-Q4 Q1-Q4 Q1-Q4 Q1-Q4 Q1-Q4	Ongoing (See charts for Q1-Q3 response statistics)

Q3 Work Plan for Fire Department - 2014

Training	~~Emergency Vehicle Driving~~	Q1	Complete
	~~Auxiliary Recruits (Basic Firefighter)~~	Q1	Complete
	~~Fire Service Instructor I~~	Q1	Complete
	~~AED Training for City Staff~~	Q1	Complete
	~~Ice Rescue~~	Q1	Complete
	~~CAD Zone Software~~	Q1	Complete
	~~Chlorine Response – Part 1~~	Q2	Complete
	~~Confined Space – Refresher~~	Q2	Complete
	~~Auto Extrication~~	Q2	Complete
	~~S100 – Wildland Firefighting~~	Q2	Complete
	~~Emergency Scene Management I~~	Q2	Complete
	~~Fire Control~~	Q2	Complete
	~~Swift Water~~	Q2-Q3	Complete
	~~BC Fire Code for Fire Service~~	Q3	Complete
	~~Chlorine Response – Part 2~~	Q3	Complete
	~~Traffic Control~~	Q3	Complete
	~~PCB Training~~	Q3	Complete
	Technical High Angle Rope Rescue – Operations	Q4	
	Fire Officer Leadership	Q4	
	First Responder Instructor	Q4	
	Emergency Scene Management II	Q4	
	Aerial Strategy & Tactics	Q4	
	Basic Rescuer I	Q4	
	Confined Space - Operations	Q4	
	Fire Officer Training	Q1-Q4	Ongoing

Q3 Work Plan for Fire Department - 2014

YOY Fire Department Incidents – January to September



Q3 Work Plan for Human Resources for 2014

Activity	Action	Timeline	Progress ($ %)
Develop & Implement a new performance review system	Review current system Research other systems Set targets Solicit feedback from staff Implement Monitor	Q2	50% complete; currently soliciting feedback
Exempt Salary Survey	Review exempt job descriptions Hire external consultant Evaluate jobs to market Review whole compensation Review with Senior Leadership team	Q2	In the process of a market analysis
Complete Policy Review	Review current policy Conduct a gap analysis Research similar policy Work with Clerks Department to ensure proper records Create/update policies as required Consult with Senior leadership group Implement policies	Q3	In progress; reviewing policies on a one-by-one basis
Attain Certificate of Recognition	Application to COR program Complete GAP analysis Review of all H&S programs and procedures Conduct audit by external auditor	TBD	Majority Complete; Waiting on external auditor availability
Develop Report and Metrics	Conduct needs analysis Review with Managers Develop the reports Ensure accessibility and availability for managers Implement & follow up on usage	Q3	In progress
Implement HRIS	Review payroll system Conduct gap analysis between HRIS and Payroll systems Review workflows Review budget	Q4	Currently on hold

Q3 Work Plan for Human Resources for 2014

	Work with Accounting & IT Depts on implementation Implement and Follow up		
Update processes to utilize new technology	Conduct needs analysis Brainstorm Review with IT Dept Discuss options with users Develop implementation plan	Q2	Working with IT, completing e-forms
Collective Bargaining CUPE	Research Commence bargaining Ratify collective agreement	Q1	Complete
Collective Bargaining IBEW	Research Commence bargaining Ratify collective agreement	Q3	Complete
Collective Bargaining IAFF	Research Commence bargaining Ratify collective agreement	TBD	Setting dates for Arbitration
Collective Bargaining Library	Research Commence bargaining Ratify collective agreement	Q4	Dates set for November
Continue to build positive morale & relationships with staff	Provide support Provide coaching Provide the staff the tools necessary to complete their work Provide encouragement and recognition	N/A	Ongoing
Complete RFP for SIMEA & EAP benefits	Review Contracts Develop RFPs Evaluate response Meet with proponents Work together with member municipalities Award Educate municipalities & staff on any changes Implement any changes	Q2	Complete. Changing administrators, implementing change for January 1, 2015
Provide Benestats to all staff	Work with Communications Develop content Work with benefit administrators Review accuracy	Q1 - 2015	Due to the change in administrators this will not be provided until early 2015

Q3 Work Plan for Human Resources for 2014

Develop a new brand for HR recruitment	Work with communications Develop a key message Develop a consistent image Implement with all correspondence and advertising	Q2	Complete

Q3 Work Plan for IT for 2014

Infrastructure & Operations

Activity	Action	Timeline	Progress ($ %)
Network & Communications Analysis	Continuously monitor, test, improve and leverage our current infrastructure systems and technologies	Ongoing	
Network Implementation	Continue moving physical servers to the new virtual server infrastructure.	Q4	75%
Network Analysis & Implementation	Research and acquire a new web application server	Q4	85%
Communications Analysis	Review all costly analog telephone services, eliminate lines not needed or not in use, investigate alternate solutions	Q3/Q4	Not started
Communications Implementation	Implement mobile device management system	Q1/Q2	75%
A/V analysis	Review current system and future needs for city video surveillance	Q4	25%
Network Analysis	Internal and External network security penetration testing	Q4	Scheduled for December 8th
Communications Analysis	Investigate SIP trunking for potential cost savings on PRI	Q4	25%
Communications implementation	Roll out instant messaging and presence client	Q4	75%
Network Analysis	Develop IT disaster recovery plan	Ongoing	
Network Implementation	Implement environmental alerting and monitoring of data centre and fiber hub building	Q4	50%
Communication Analysis	Investigate e911	Q4	
Network Analysis	Investigate virtualizing all telephone hardware servers	Q3/Q4	2015 Budget Item
Communications Analysis	Investigate reducing the number of DID lines	Q3/Q4	50%
Communications Analysis	Implement & monitor voice mail auto attendants	Ongoing	

Q3 Work Plan for IT for 2014

Applications & Development

Activity	Action	Timeline	Progress ($ %)
Continuous Improvement	Continuously improve and leverage current systems and technologies	Ongoing	-
Continuous Improvement	Work with staff to implement new workflow and process changes in our enterprise systems	Ongoing	-
Continuous Improvement	Continuously analyze ways to improve or automate works flows and processes to gain efficiencies	Ongoing	-
Database Migrations	Move Tempest Live & Test to new virtual server	Q1	100%
Database Migrations	Move CIS Live & Test to new virtual server	Q1	100%
Database Migrations	Move CityView Live & Test to new virtual server	Q1	100%
Application Migrations	Continue moving applications to new virtual servers	Q1/Q2/Q3/Q4	80%
Business Analysis	Work with Admin Office on the document management project	Q4	10%
Business Analysis	Work with Recreation on the implementation of an automated staff scheduling system	Q3/Q4	100%
Implementation	Continue implementing Tempest Calls for Service to departments, deploy web submission, investigate link to ArcGIS	Q1/Q2/Q3/Q4	40%
Business Analysis	Investigate Digital Asset management system for photos	Q4	
Implementation	Deploy Agresso mobile apps	Q3	75%
Implementation	Expand online payments	Q4	-
Implementation	Work with Fire Department on implementing City of Kelowna's FDM workspace.	Q3/Q4	-
Business Analysis	Work with Rec on the transition from CLASS to ActiveNet.	Q2/Q3/Q4	20%

Q3 Work Plan for IT for 2014

Technical Support

Activity	Action	Timeline	Progress ($ %)
Support	Support customers with use of technology	Ongoing	
Implementation	Replace 50 computers as part of the 5 year desktop replacement program	Q1/Q2/Q3/Q4	80%
Implementation	Replace 20 Laptops as part of the 4 years laptop replacement program	Q1/Q2/Q3/Q4	50%
Implementation	Replace 10 tablets	Q1/Q2/Q3/Q4	
Implementation	Bring council web stream in house, implement video indexing server	Q3	50%
Implementation	Install digital signage in City Hall	Q4	25%
Analysis & Implementation	Identify and replace all Windows XP computers	Q3	85%
Analysis & Implementation	Minimize IT storage. Streamline disposal process.	Ongoing	
Implementation	Implement credit card payment kiosk in City Hall	Q4	
Implementation	Work with Fire Department on implementing City of Kelowna's Mobile CAD in Fire Trucks	Q4	50%

Geographical Information Systems

Activity	Action	Timeline	Progress ($ %)
Support	Support City staff with mapping and data analysis needs. Support current legacy mapping systems for internal and external users	Ongoing	
Implementation	Continue implementation of GIS Project	Ongoing	
Training	Increase awareness of GIS through seminars, webinars and in house training	Ongoing	
Training	Train Key staff on maintaining data in GIS	Ongoing	
Analysis	Investigate integration of GIS with Cemetery software	Q3/Q4	
Analysis	Investigate integrations of GIS with Tempest Calls for Service module	Q3/Q4	
Implementation	Work with Google to update google maps with	Q3/Q4	50%

	2012 Ariel photography		

Management

Activity	Action	Timeline	Progress ($ %)
Project Management	Implement Agresso Planner module for City Budgeting	Q1/Q2/Q3	90%
Project Management	Lead GIS implementation Project	Ongoing	
Project Management	Lead Tempest Prospero Project	2015	
Implementation	Work with communications on the digital roll out of the new city branding	Q1/Q2/Q3/Q4	75%
Implementation	Work with HR on setup of computer based training center, increase use of eLearning and implementation if IT cross training program	Q2/Q3/Q4	50%
Implementation	Work with HR & Communication to improve engagement on the city intranet web application. Apply branding to Intranet.	Q2/Q3	
Management	Continuously manage mobile voice and data plans for cost control.	Ongoing	
Contract Administration	Work with Microsoft on the Enterprise Agreement renewal for 2015-2018. Review BC Microsoft Select Agreement.	Q3	25%
Contract Administration	Work with ESRI GIS Enterprise Agreement renewal for 2015-2018	Q3	25%
Implementation	Replace Multifunction Photocopiers, implement secure print, right size fleet, eliminate redundant expensive printers, implement print management for cost control	Q3	100%
Implementation	Implement eForms as needed	Ongoing	
Management	Look at application consolidation for reducing operating costs	Ongoing	
Contract Administration	Work on renewal of cell phone contract for 2015	Q3	
Management	Develop IT documentation updating plan	Q4	25%
Management	Implement Change Management in the IT ticketing	Q3	25%

Q3 Work Plan for IT for 2014

	system		
Management	Develop SHAW Public Wifi landing page	Q2	50%
Management	Investigate the creation of a working group for fiber network	Q3	
Management	Develop IT security & Mobile Encryption policies	Q3/Q4	10%
Management	Work with facilities on renovation projects	Q1/Q2/Q3	75%

Q3 Work Plan for Museum & Archives for 2014

Activity	Action	Timeline	Progress ($ %)
Operations	Complete 5 Year Master Plan initiated in '07	Sept 2014	95%
	Initiate new 5 Year Strategic Plan to start '14	Dec 2014	0%
	Complete Phase 1 of museum renovation – Atkinson Gallery & Office & Public Areas	Aug 2014	100%
	Submit designs for new signage (outdoor & indoor)	May 2014	100%
	Develop business case for new Gift Shop	June 2014	85%
		Dec 2014	0%
Exhibits	Install exhibit *War of 1812* in Atkinson Gallery.	Jan 2014	100%
	Install exhibit *The Long Journey Home* in Atkinson Gallery		
	Install exhibit *Fireborn* in Atkinson Gallery	May 2014	100%
	Update & renovate SS Sicamous exhibits on Deck A, B & C		
	Install WWI exhibit in Permanent Gallery	Sept 2014	100%
		July 2014	100%
		Aug 2014	100%
Collections	Renovate storage rooms & install storage equipment for artifacts.	Sept 2014	100%
	Re-assignment of artifacts into new storage locations	June 2014	100%
	Inventory of entire PMA artifact collection	Dec 2014	90%
	Inventory of SS Sicamous artifact collection	June2014	95%
	Inventory of city artifact collection (City Hall)	Oct 2014	90%
	Digitise collection onto database	Dec 2014	60%
Programs	Development & delivery of Local Lore project (in tandem with Steamfest)	Dec 2014	75%
		Dec 2014	
	Delivery of up to 25 school programs under Curator Kids	June – Sept 2014	100%
	Delivery of up to 30 family programs	Dec 2014	75%
	Delivery of 10 adult programs	Dec 2014	75%

Q3 Work Plan for Museum & Archives for 2014

	Delivery of up to 30 Brown Bag lectures	Dec 2014	75%
	Delivery of up to 10 weekly Facebook projects.	Dec 2014	75%
	Plan, schedule and fundraise for Steamfest 2014-15	Ongoing	75%
	Assist city with Heritage projects thru HM Advisory		75%
Archives	Upgrade archival storage systems	Dec 2014	75%
	Digitise & OCP Pen Herald microfilm	June 2014	90%
	Digitise photograph collection & enter into database.	Dec 2014	90%
	Digitise large format docs, maps, plans	Ongoing	50%
	Input Local Lore data into Historypin and Ancestry.ca	Ongoing	50%

Q3 Work Plan for Public Works for 2014

General Revenue – Roads & Other			
Activity	**Action**	**Timeline**	**Progress ($,%, Comp)**
Snow and Ice Control Policy	Revise & Council Endorsement	Q4	N/A
Traffic Control Box Wraps CAP298-006	~~Design~~ ~~Procure & Install~~	Complete Complete	$5,000 ($4,200) 84%
Walkway Upgrades CAP298-004	Inspect & Repair	Q4	$20,000 ($7000) 35%
Snow & Ice Control Survey	~~Analyse Survey Results~~ Determine Action Report if Required	Complete Q4 Q4	N/A
MMBC Implementation	~~Implement Public Education~~ ~~Report to Council – Fees / Services~~	Complete Complete	N/A – 100 % Complete
Calls For Service – Software Implementation	~~Public Works & Engineering Implementation~~	Complete	N/A

General Revenue - Parks			
Activity	**Action**	**Timeline**	**Progress ($,%,Comp)**
Skaha Playground – Upgrade CAP105-001 TO CAP105-004	~~Letter to South Okanagan Children's Charity –~~ ~~Budget Approval~~ ~~Plan and Concept approval~~ ~~Commitment from Charity~~ ~~Design~~ ~~Tender / RFP – Equipment~~ ~~Notification – Paper and Council~~ ~~Construction~~ ~~Grand Opening Ceremony~~	Complete Complete Complete Complete Complete Complete Complete Complete Complete	$35,000 ($44,300) 126%
Marina Way Look Out Park CAP108-001 TO CAP108-003	~~Design~~ ~~Public / Council Consultation~~ Construction ~~Grand Opening Ceremony~~	Complete Complete Q3 Complete	$109,000 ($81,000) 75%

Q3 Work Plan for Public Works for 2014

Skaha Park Green Gym CAP112-001 TO CAP112-003	~~Grant Award~~ ~~Design~~ ~~Public Consultation~~ ~~RFP for Equipment~~ ~~Construction~~ ~~Opening Ceremony~~	Complete Complete Complete Complete Complete Complete	$5,900 ($5,400) 91%
Rose Garden Upgrades – Donation Dependant CAP113-001 TO CAP113-003 Upgrades to Rose Garden Gazebo on hold pending the outcome of the SS Sicamous Master Plan	~~Solicit and Consolidate Donations~~ Design ~~Site Clean Up – PIB Consultation~~ RFP or Quote – Gazebo Construction Opening Ceremony	Complete Q3 Complete Q3 Q4 Q4	$37,000 ($16,300) 44%
Tree Planting CAP 378-001 TO CAP378-002	~~Design~~ Construction	Complete Q3	$20,000 ($18,000) 90%
Pathway Upgrades CAP 379-001 TO CAP379-002	Inspection & Repair	Q4	$10,000 ($0) 0%
Columbia Tennis Court Upgrade CAP 368-001 TO CAP368-002 On hold pending outcome of Pickleball Court development noted below.	Repair	Q4	$5,000 ($0) 0%
Pickleball Court CAP 369-001 TO CAP369-002 Awaiting New Horizons Grant Application for 50% funding	Stakeholder Meeting Design Construction (if cost shared)	Q3 Q3 Q3	$20,000 ($800) 4%
Playground Surface Upgrades CAP 370-001 TO CAP370-002	Construction	Q3	$20,000 ($15,000) 75%
Kings Park Mesh Replacement CAP 372-001 TO CAP372-002	~~Construction~~	Complete	$10,000 ($6,100) 61%

Q3 Work Plan for Public Works for 2014

Beach Safety Audit – Signs CAP 373-001 TO CAP373-002	~~Design~~ ~~Tender~~ Installation	Complete Complete Q4	$30,000 ($19,500) 65%
Slo-Pitch Field Upgrades CAP 377-001 TO CAP377-002	~~Stakeholder Mtg~~ ~~Design~~ ~~Tender~~ ~~Construction~~	Complete Complete Complete Complete	$33,000 ($32,000) 98%

Cemetery			
Activity	**Action**	**Timeline**	**Progress ($,%,Comp)**
Fairview Cemetery Upgrades CAP 380-001 TO CAP380-002	~~Design / Plan~~ Tender / Quote as Required Construction	Q3 - Complete Q4 Q4	$78,500 ($1,100) 1.4%
Lakeview Cemetery Expansion & Upgrades CAP 381-001 TO CAP381-002	P1 & P2 Geo-Tech & Design ~~Lower Bench Road – Geo-Tech & Design (if required)~~ Installation of Screening	Q3 95% Complete Q3 - Complete Q4	$93,800 ($48,100) 51%

Water Utility			
Activity	**Action**	**Timeline**	**Progress ($,%,Comp)**
Rural Meter Pits CAP 288-010	Notification Construction	Prior to work Q1-Q4	$45,000 ($30,000) 66%
Irrigation Upgrading CAP 289-004	~~Planning of Projects~~ Notification as required Construction	Complete As required Q1-Q4	$25,000 ($5,000) 20%
Greyback Dam – Level & Flow Monitoring CAP 290-014 May have to carry over to 2015 depending on weather	~~RFP~~ ~~RFP Award~~ Construction	Complete Complete Q4	$150,000 ($21,200) 14%
Dam Safety Review CAP 290-015	~~RFP~~ ~~RFP Award~~ Completion of Report	Complete Complete Q4	$110,000 ($109,000) 99%
Fire Hydrant Spacing Improvements CAP 288-007	Planning Notification – As Required Construction	As required Q1-Q4	$80,000 ($23,000) 30%

Q3 Work Plan for Public Works for 2014

Sewer Utility			
Activity	**Action**	**Timeline**	**Progress ($,%,Comp)**
Compost Site – Upgrades and Consulting CAP 133-001 TO C AP133-002 Project will be deferred to 2016 pending discussions with RDOS.	~~Complete Design - Complete~~ Plan Works Schedule Works Tender (S) Construction	Q3- Complete 2015 2015 2015 2015	$2,000,000 ($49,600) 2.5%
Gas Detectors CAP 382-001	~~Tender~~	Complete	$8,000 ($7,400) 93%

Fleet			
Activity	**Action**	**Timeline**	**Progress ($,%,Comp)**
Purchase Fire Truck CAP 151-001	Create RFP / Purchase Used RFP Evaluation Issue PO Take Possession	Q4 Q4 Q4 2015 Q1	$350,000 ($0) 0%
Purchase 1 – ½ Ton Truck CAP 151-001	~~Tender Award~~ ~~Take Possession~~	Complete Complete	$25,000 ($23,800) 100%
Purchase 1 – Passenger Car CAP 151-001	~~Tender Award~~ ~~Take Possession~~	Complete Complete	$25,000 ($21,600) 100%
Purchase 1 – 1 Ton Dump Truck CAP 151-001	~~Tender Award~~ ~~Take Possession~~	Complete Complete	$50,000 ($39300) 100%
Purchase 1 – Tandem Dump Truck CAP 151-001	~~Tender Award~~ Take Possession	Complete Q3	$160,000 ($145,000) 75%
Purchase 1 – Leaf Vacuum CAP 151-001	Tender Award Take Possession	Q3 Q3	$45,000 ($0) 0%
Purchase 1 - Tractor CAP 151-001	~~Tender Award~~ ~~Take Possession~~	Complete Complete	$50,000 ($40,000) 100%
Purchase 1 – Sander Hydraulic Upgrade CAP 151-001	~~Tender Award~~ ~~Take Possession~~	Complete Complete	$25,000 ($20,000)

Q3 Work Plan for Public Works for 2014

			80%
Purchase 1 – Ice Re-Surfacer CAP 151-001	~~Tender Award~~ ~~Take Possession~~	Complete Complete	$105,000 ($109,000) 100%
Parks Small Equipment Replacement CAP 151-004	Tender Award Take Possession	As Required Q1-Q4	$12,100 ($6,000) 50%
Shop Equipment CAP 151-002	~~Tender Award~~ Take Possession	As Required Q1-Q4	$21,000 ($15,000) 75%

Q3 Work Plan for Purchasing for 2014

Activity	Action	Timeline	Progress ($ %)
Tenders, RFPs, RFQs	Tenders, RFPs and RFQs prepared, posted and advertised • 38 – Q1 • 22 – Q2 • 11 – Q3	Ongoing	Complete and ongoing
Cost Savings	Cost savings by obtaining quotes • $323,702.14 – Q1 • $774,832.66 – Q2 • $446,757.55 – Q3	Ongoing	Complete and ongoing
Revenue	Dispose of surplus/obsolete equipment • $1,697.25 - Q1 • $15,193.71 – Q2 • $25,378.85 – Q3	Ongoing	Complete and ongoing
	Revenue from SPCA Dog Tag Sales • $3,410.00 – Q1 • $927.00 – Q2 • $269.00 – Q3	Ongoing	Complete and ongoing
Purchasing Cards	• $139,110.30 – Q1 • $201,703.89 – Q2 • $141,904.93 – Q3	Ongoing	Complete and ongoing
Notices	Q1 • Energy Retrofit Program on-going. Q2 • Notices to Capital Works area residents • Notices to Carmi and Wiltse residents re traffic calming • Set up Calls for Service module in Tempest • Solid Waste and Recycling calendars complete and delivered Q3 • Notices to Carmi and Wiltse School area residents regarding traffic calming • Notices to owners and businesses regarding	Ongoing	Ongoing

Q3 Work Plan for Purchasing for 2014

	Industrial Ave Reconstruction • Amend all Energy Retrofit forms to reflect extension to the program		
Purchasing Policy	Q1 • Presented Purchasing Policy to Leadership – asked to relax the sustainable purchasing requirements.	2014-Q4	85%
Stationary Purchases	Create policy and set up users for e-way ordering	2014-Q4	40%
Purchases	Daily orders of inventory and project items	Ongoing	Complete and ongoing
New Dog Kennel Facility	Work with Facilities Supervisor to site and construct new dog kennel facility	2014-Q4	10%
RDOS Use of Kennel Facility	Agreement signed with RDOS for $7,500 per year for 5 years with a 5 year renewal option	2014-Q3	Complete
Construct new Dog Control Officer Dwelling	Work with Facilities Supervisor to site and construct new Dog Control Officer dwelling	2014-Q4	0%
Bar Coding	Work with IT Manager to investigate and install bar coding for warehouse inventory	2014-Q4	0%
Tender, RFP, RFQ and Contract Review	Have templates reviewed and amended by legal counsel	2014-Q4	0%
Insurance Master List	Created master list for insurance coverage, WCB Clearance Letter and Business Licence	2014-Q2	Ongoing

Q3 Work Plan for Recreation for 2014

Activity	Action	Timeline	Progress ($ %)
Fees & Charges Review	Develop a plan to phase in increased pool lane rental rates to be in line with market rates	Q1-Q3	75% complete
	Conduct a detailed review of parks and sport field rental rates to determine if rate adjustments should be considered	Q2-Q3	30% complete
	Conduct an analysis of current rental rate categories and formulas to determine if category adjustments should be considered	Q2-Q3	10% complete
	Review prime and non-prime rental rate options	Q2-Q3	20% complete
	Develop recommendations for September 2014 (pool lane rental rates) and 2015 (all other rental fees) and present to Council	Q3	10% complete
	Develop 2015 Admission Fees proposal (effective April 1, 2015) and present to Council	Q4	0% complete
Recreation Department Staffing Review	Implement Aquatics staffing restructure	Q1	100% complete
	Conduct a Recreation program, reception and marketing staffing review	Q2-Q4	20% complete
Marketing and Promotions	Develop an Annual marketing schedule	Q1	100% complete
	Review and expand Active Membership Program	Q3	30% complete
	Explore new initiatives for promotion to targeted markets (ie Youth, Older Adults)	Q2-Q4	75% complete
Beach, Park, Street and Mobile Vending	Develop and implement strategies to optimize vending opportunities and revenues	Q1-Q2	100% complete
Fitness Room	Implement Fitness Room expansion project and layout of equipment	Q1-Q3	Deferred to 2015
	Develop and implement Fitness Room optimization strategies after expansion	Q3-Q4	Deferred to 2015
Business Management Systems	Integrate Class (recreation software) with Agresso – with IT and Finance Dept	Q3-Q4	0% complete
	Develop real time Recreation budget reporting systems – with IT and Finance Dept	Q3-Q4	0% complete
	Research, purchase and implement shift scheduling	Q1-Q3	75% complete

Q3 Work Plan for Recreation for 2014

	software for Aquatics Department – with IT Dept		
Events	Integrate title sponsorship and partnership opportunities to expand the Family Day special event at the Community Centre	Q1	100% complete
	Facilitate implementation plans for the 2016 BC Winter Games in Penticton	Ongoing	Ongoing
	Update Events Manual, Event Applications and Online Communications	Q1-Q2	100% complete
	Expansion/development of Indoor Triathlon	Q2-Q3	90% complete (new model)
	Expansion of Youth Park Special Event during Peach Festival	Q2-Q3	100% complete
	Implement Customer Appreciation small event(s) at the Community Centre	Q4	0% complete
McLaren Arena	Develop and implement Arena program plans	Q2-Q3	70% complete
	Develop and implement advertising plan	Q2-Q3	15% complete
Yacht Club	Develop and implement booking protocol	Q1	100% complete
	Develop and implement communication plan	Q1-Q2	100% complete
Cleland Theatre	Implement optimization plan	Ongoing	Ongoing
	Develop and implement Theatre technician/staffing plans	Q1	100% complete
Program Development	Gymboree (parent & tot gymnasium program) revisions – new equipment and program structure	Q3	80% complete
	Explore youth programming partnership opportunities	Q1-Q4	75% complete
	Fitness program ongoing development and expansion	Ongoing	Ongoing
	Aquafit staff training review – optimize and develop aquafit program	Q2-Q3	75% complete
Healthy Living Initiatives	Active member of Okanagan Similkameen Healthy Living Coalition (OSHLC)	Ongoing	Ongoing
	Liaise with Interior Health, community partners / stakeholders and new healthy living community and provincial initiatives; facilitate new partnership projects	Ongoing	Ongoing
	Implement hearts@school Grade 6 Health Fair	Q1-Q2	100%

Q3 Work Plan for Recreation for 2014

New Revenue Development	Develop and implement expanded Community Centre merchandising/retail sales	Q2-Q3	10% complete
	Explore new lease opportunities at the Community Centre	Ongoing	Ongoing
	Assessment of sponsorship and advertising opportunities	Q2-Q3	10% complete
	Sales orientation training for staff	Q3	0% complete

Q3 Work Plan for Revenue Department for 2014

Activity	Action	Timeline	Progress ($ %)
Permissive Tax Exemption Applications	Send letters to last year's applicants Media ads New certificate forms for Churches to sign Update application to new Corporate brand and post on City website	May 15	Completed, bylaw will be adopted at next Council meeting ($0.00) (99%)
Sewer Area Parcel Tax Detailed Report	Have IT prepare a report	April 30	($0.00) (100%)
Paymentus	Prepare a bylaw that will to allow Paymentus to charge their fees when customers are paying with a Visa Credit card	Visa has requested new wording	Complete
Ebilling Promotion	Continue to promote ebilling for our utility and tax customers		Ongoing
Billing fee for utility invoices ($1.00)	Draft an amendment for the fees and charges bylaw Work with CIS to implement in our billing software Media ads to coincide with Ebilling promotions	June 30, 2014	In progress (0.00) (25%)
Tempest GLINT update	Replace GLINT table with new codes to match Agresso	December 31 2014	Ongoing
Water billing monthly	Memo, media ads	October 31, 2014	In progress ($0.00) (50%)
Utility Disconnect Policy	Prepare analytical review	October 31, 2014	In progress ($0.00) (50%
Agresso Accounts Receivable	Work with IT to complete program set up		In progress ($0.00) (90%)
CityView to Tempest coding	Matching all coding to ensure revenues and expenses are posting correctly		Complete (100%)
Paymentus processing utility and property tax payments	Working with our IT department and Paymentus for a workable solution	ASAP	In progress (0.00) (50%)
Convert all forms to the new Corporate Brand	As inventory is depleted update forms and reorder in the new format	Ongoing	In progress (90%)
Property Tax Rates 2014	Prepare reports and bylaw	May 15	100%

Term Review 2011 – 2014: Corporate Services & Communications

Success Headlines	Highlights	Results ($ %)
Enhanced transparency	Developed a list of "Routinely Available Documents" to assist staff quickly process information requests for standard documents and records, versus directing requests through Freedom of Information and Protection of Privacy channels.	Organizational efficiencies
	Developed City Newsletter incorporating a roundup of City news distributed monthly through utility bills	Community awareness
	Penticton Council Highlights produced after each Council meeting to highlight actions and decisions by Council.	Community awareness
Education	Hosted legal seminar to enhance internal knowledge of zoning applications, Freedom of Information and Protection of Privacy legislation,	Organizational capacity
	Developed web content standards and trained staff	Organizational capacity
	Conducted training and education on visual identity	Organizational efficiency
	Canada Anti-Spam Legislation awareness and consent process development	Organizational capacity
Branding	Developed first Visual Identity Brand Standards Manual	Organizational efficiency
	Developed over 100 templates for organization's use	
Social media	Facebook, Twitter, LinkedIn, YouTube accounts all established	Community awareness
	Social networks growing substantially	
	Engaging communities in two-way dialogue – answering questions and providing updates	
Records management modernization	Research technology solutions for scanning equipment that produces searchable documents (with IT)	Organizational efficiency
	Developed a detailed and searchable index of policies	Organizational efficiency
	Developed a detailed and searchable index of bylaws	Organizational efficiency
	Developed a detailed and searchable index of agreements	Organizational efficiency
	Review of library inventory to reduce duplication	Organizational efficiency
Emergency planning	Functional Emergency Information Plan developed	Organizational capacity
	Template, material and message development completed for 19 different scenarios according to risk assessment model	Organizational capacity
	Contacts assimilated and backed up	

Term Review 2011 – 2014: (Development Services Division)

Success Headlines	Highlights
Divisional	
	• Lead for Downtown Revitalization Strategic Priority • Member of the Urban Development Institute – Okanagan Region • Customer Service Training for staff – significant enhancements • Work with Development Services Advisory Committee to improve operations. • Staff Orientation Manual – clear expectations for staff. • Staff accessibility increased at front counter • Strong link with Economic Development Officer
Building & Licencing Department	
	• Proactive approach dealing with the industry – preliminary meetings to deal with issues early. • Increased staff resources for Plan Reviews so BPs can be issued quickly. • Member of the Canadian Home Builder's Association – attendance / advice at meetings. • 30 day preliminary business licence initiated to get new business starting quickly • Reduced building inspections / Increased reliance on professionals. • Current Building Permit timelines outstanding. • The building department is solution oriented and works with the development community. • 30% reduction in Building Permit Fees • Business Licencing moved back to Development Services – better co-ordination with building and planning department requirements. • Increased waiver forms to reduce City involvement in this process – reliance on owner / tenant has increased. • Cross connection now part of Building department allows better link with work responsibilities and numerous efficiencies found.
Bylaw Enforcement Department	

Term Review 2011 – 2014: (Development Services Division)

	• Good Neighbour Bylaws – active enforcement of abandoned and derelict buildings. • City-Wide Parking Program implementation • Increased awareness of public needs. • Common sense approach to issues as they arise. • Encourage compliance and enforce as a last resort. • Dedicated Bylaw Supervisor hired and able to manage the day to day functions of department more efficiently • Initiation and implementation of City-Wide parking program.
Land Management Department	
	• Hiring of new Land Administrator • Provide Professional Advice on Real Estate matters, including opinions of Market Value, to senior staff and Council – saving costs for the City • Oversee Sales, Leases, Licences and Rentals of City Property and the Lease and Licence of Properties required by the City • Ensures the Legal requirements and documentation of land related issues and transactions are completed as required by all City Departments • Contract to assist in locating and identifying individual City Owned properties for future assessment – completed. • Review existing leases for non-payments / historical discrepancies. • Co-ordinate administrative review of historical land files, encroachments and agreements.
Planning & Land Use Department	

Term Review 2011 – 2014: (Development Services Division)

	• Downtown Plan – completion of award winning vision for downtown Penticton. The project was completed in-house and resulted in significant support from the community and cost efficiencies for the organization. • Climate Action Plan implementation, ongoing reporting and greenhouse gas reductions. • Martin Street Revitalization Project – First Streetscape improvement project in Penticton's downtown in over 20 years. • Sign Bylaw Enhancements to remove red tape. • Economic Investment Zone Bylaws – Downtown / Industrial / Tourism areas. Over $30M of new development and more than 350 new jobs directly attributable from the incentive bylaws. • Planning Process Improvements – efficient process • Implementation of the New Zoning Bylaw • Amendments to procedural bylaws to allow Development Variance Applications to be heard at one Council meeting, rather than two – saving up to one month in processing times. • Amendments to OCP so that if a variance is required as part of a Development Permit; they can be approved by Staff or by Council without the need for additional applications, fees and time. • DCC Reduction Bylaw for Affordable Housing and Green Buildings. • Average time for a Development Permit – 4 week (up to one year elsewhere. • Average time for a Rezoning – 8-12 weeks (more than one year in other areas)

Term Review 2011 – 2014: (Electrical Department)

Electrical - Distribution Success Headlines	Highlights	Results
Westminster Substation Upgrade Underway	• Agreement negotiated with FortisBC for the substation upgrade. • Work underway • Expected to be inservice summer 2015	Upgrade is vital to the long-term sustainability of the Utility infrastructure Allows for load growth in the downtown core and improves the reliability of the power grid
Home Energy Loan Program	• Helping residential customers save money on their utility bills through home energy improvements	Cost $1.5M over 4 years 98+% of costs recovered through loans & related interest Utility Bill reductions projected at12%
Targeted Infrastructure Investments to Improve Electrical Power Supply Reliability	• Improved back-up capability between Huth & Carmi Sub-stations	Installation of an Autotransformer on Dawson Ave. Installation of voltage Regulator banks on Kensington St., Middle Bench Rd. & Hudson St.
Labour Stability Reached with IBEW	• Collective agreements with IBEW reached.	Five year collective agreement with IBEW in place.
Environmental Stewardship	• Ensured compliance with Federal & Provincial hazardous PCB material handling	PCB's will be completely eliminated from the distribution system by 2016
Electrical - Traffic Signals **Success Headlines**	**Highlights**	**Results**
New Pedestrian Activated Traffic Lights for a Safer Community	• Pedestrian Signals installed at Main St. & Okanagan Ave and, Johnson Rd. & Middle Bench Rd	Improved safety for pedestrians
Improved Traffic Signal Visibility	• Upgrade secondary traffic signals from 8" to 12" with backboards for greater visibility	Larger secondary traffic signal heads installed throughout the City. Subsidies received from ICBC helped pay for this project
Electrical – Street Lighting **Success Headlines**	**Highlights**	**Results**
City Commenced LED Street Light Program	• LED lights successfully installed along Lakeshore and Skaha Lake Rd	50% less energy = $75k/year

Term Review 2011 – 2014: (Electrical Department)

Electrical - Metering Success Headlines	Highlights	Results
AMR Metering Nearly Complete	• 99% of all meters have now been replaced	Improved efficiency and accuracy in utility billing

Term Review 2011 – 2014: (Engineering Department)

Engineering - Design Success Headlines	Highlights	Results
Walkways and Bike Lanes Improved	• Upgraded 4.4km of KVR trail and installed bike lanes on Carmi, Atkinson, Kinney, Dawson and Dartmouth Road and Dartmouth Drive. Sharrows installed on Ellis Street.	Enhanced trail and cycling facilities installed to encourage and promote environmentally friendly physical activity
West Okanagan lake Waterfront Walkway Opens	• Installed new walkway between SS Sicamous and The Peach	Enhanced pedestrian and cyclist experience and completion of significant part of a strategic priority
Revitalization of Downtown Commences with Martin and Westminster	• Reconstructed sections of Westminster Avenue and Martin Street.	Improved sidewalk facilities on both streets and opportunity to convert parking to storefront use on Martin Street
Traffic calming in school zones	• Installed temporary road narrowing, speed humps, signage and speed reader display boards at Parkway, Wiltse	Increased driver awareness of school zone conditions.
Engineering – Water Treatment Plant **Success Headlines**	**Highlights**	**Results**
Water Plant PLC Upgrade Completed	• Upgraded automation of the water plant control	Increased security for the Water Treatment system
Valve Modifications Improve Water Distribution	• Corrected distribution issue in the Gordon Avenue Reservoir	Better water flow results
Engineering – Advanced Wastewater Treatment Plant **Success Headlines**	**Highlights**	**Results**
Installation of Screw Pumps Complete	• Replaced 35 year old critical equipment	Dependable influent pumping for the next 20 years
High Efficiency Aeration Blower Installed	• Energy savings will result with some offset to come from FortisBC	Lower electricity bills
Design of a New Fermenter Underway	• Will replace 25 year old structures that are failing due to corrosion	Dependable plant operation for the next 20 years
Obsolete PLC Equipment Replaced at Lift Stations	• Replaced obsolete PLC equipment	Dependable Lift Station controls for the next 10 years

Term Review 2011 – 2014: Human Resources

Success Headlines	Highlights	Results ($ %)
	• Successfully deployment AEDs and program to all city facilities	N/A
	• Developed and Implemented a new ESS Team Development	N/A
	• Introduced and installed the E-Panic System at city hall	N/A
	• Successfully negotiated new CUPE and IBEW agreements	N/A
	• Creation of a new performance review system	N/A
	• Created and Implemented the Foreman Succession Program	N/A
	• Developed and implemented Employee Engagement Initiatives	N/A
	• Successfully negotiated new employee benefits administrators	N/A
	• HR took a lead role on the Agresso conversion project	N/A
	• Several leadership development opportunities provided for employees (workshops)	N/A
	• Successfully implemented Agresso Payroll resulting in a more efficient, stream-lined process	N/A
	• Successfully integrated Payroll position from Union into HR	N/A

Term Review 2011 – 2014: (Public Works Department)

Public Works - Roads		
Success Headlines	**Highlights**	**Results**
Downtown Core Planters Removed to improve Safety	• Street scape cleaned up with removal of planters and installation of new benches	Eliminated undesirable activities on the bench planters, resulted in a cleaner look and opened up sidewalk space.
Public Works - Solid Waste		
Success Headlines	**Highlights**	**Results**
City implements the MMBC Recycle Program	• Consistent program across BC • End of life recycle costs covered by producers • Financial incentive paid to City – Solid Waste and Recycle Reserve Account	An estimated annual contribution of $470,000 will be deposited into the reserve account. This revenue will be used to improve & sustain the solid waste and recycle initiatives while minimizing the financial impact on residents.
Public Works – Cemetery	•	
Success Headlines		
Penticton Cemeteries Master Plan Completed	• Immediate & 25 year work plan developed • Finances reviewed • Lakeview Cemetery capacity studied Interment Trends identified	Cemetery Fees and Charges adjusted to ensure competitive fee structure that ensures short term and long term financial objectives are met. Long term capital upgrades are identified and prioritized.
Penticton Lakeview Cemetery Expansion Design Completed	• Expansion will meet the next 10 year needs in capacity and interment options.	Design will be complete in 2014 in time for construction in 2015 ensuring no disruption to the Cemetery Services.
Fairview Cemetery Improvements	• Site upgrades to improve condition and increase the profile and historical significance of Penticton's original cemetery.	Work will commence in 2014.
Public Works - Parks		
Success Headlines	**Highlights**	**Results**
Discovery Park at Skaha Lake Pentictons' First	• Partnered with local charities and businesses	A magnificent, one of a kind playground that blends

Term Review 2011 – 2014: (Public Works Department)

Natural Built Playground	to design and build Penticton's first 'natural' playground, $70,000 donated towards project, total cost $105,000	perfectly into the surrounding landscape that is designed to stimulate the creatively of the young mind.
Marina Way Beach Lookout Park Completed	• Constructed new green space, parking and amenity areas next to Marina Way beach	The end result has turned an unsightly underused section of lakeshore property into another park asset for the community to enjoy.
KVR Trail Upgraded to Make Access Easier	• Asphalt composite surface improvements • Crosswalk gates & bollards added for safety • Distance markers installed • Cost shared with the Province of BC	Improved the accessibility and usability of an incredibly scenic section of the KVR trail network.
Skaha Park Expanded	• Developed 3 acres of new manicured park picnic area at Skaha Park, included pathways, furniture and new trees	Converted a unkempt and unused 3 acre section of Skaha Beach Park into additional green space to be enjoyed by all.
FIVE New Off Leash Dog Parks Opened	• Opened five new off leash dog parks creating a total of six off-leash areas (3 parks, 3 beaches).	Provided an opportunity for pet owners and pets to interact in a safe and contained environment.
Ellis Creek Park Open to the Public	• Completed construction of new green space, trailhead and off leach dog park with Local Motion grant funding	This project turned an unused section or Road Right of Way in to creek side trail head and highly used off-leash dog park.
Beach Access Ramps Installed	• Improved accessibility to beaches and lakes by installing new accessible ramps at both Skaha and Okanagan Lakes	The project has created the opportunity for mobility challenged individuals to gain access to one of Penticton's most valued park assets.
Skaha Outdoor Fitness Park Open	• Installed new outdoor Fitness equipment at Skaha Park utilizing$25,000 in grant funds	An outdoor seniors exercise facility has been created.
City Embarks on Tree Planting Projects	• 2012 and 2013 Penticton named 'Green Streets Community' and awarded $27,000 by Tree Canada in support of planting more trees at Skaha Park, and for new Rotary Peace Park • Involved and engaged students from high schools in both tree planting projects • Partnered with TD Bank for annual TD Tree Days, volunteer tree planting projects along	The City's tree inventory has grown through partnerships in funding and implementation. Community engagement and recognition were gained through this annual project.

Term Review 2011 – 2014: (Public Works Department)

	local creeks	
Tennis Court Improvements Made	• Surfacing upgrade made to Lakawanna tennis courts	Improved safety and aesthetics resulting in higher usage.
Sport field Improvements Completed	• Added and upgraded fencing at sports fields for safety improvements • Partnered with Penticton Slo Pitch League to add dugouts and make improvement at Lions and Skaha ball diamonds	Improved facilities for our sporting community to enjoy realized through funding partnerships.
Playground Safety Improvements Put In Place	• Initiated playground safety surfacing replacement program, to improve safety for children and for operational efficiencies	Provided safe playgrounds for families to enjoy and partake in outdoor play opportunities.
Public Works - Fleet		
Success Headlines	**Highlights**	**Results**
Equipment Replacement Saves Budget Dollars	• Altering purchasing policy to allow purchase of used equipment saves money and time.	Cost efficient equipment purchases performed in a timely manner.

Term Review 2011 – 2014: (Public Works Department)

Public Works - Transit		
Success Headlines	Highlights	Results
Significant increase in Handy-Dart service provided	• Hours of service change from 2000 hours / year to 4000 hours / year	100% increase in available hours
City undertakes a Trial with the new smaller Vicinity Bus	• Two Vicinity Buses replace two Nova buses for a one year trial.	Smaller more fuel efficient buses being used on City bus routes.
Special Event Service added for Peach Festival	• Service on the Main Street Route extended to 1200 am for Peach Festival	Provided 346 rides to customers
Public Works - Water Utility		
Success Headlines	Highlights	Results
Water Meter Upgrade Complete	• All residential water meters upgraded complete with Radio Frequency Reading System	Resulted in a modern metering system that has created a reliable system in which water usage data can be collected very efficiently.
Water Storage Dams Upgraded to Meet Legislation and Safety Requirements	• Penticton 2 Dam Upgraded • Greyback Dam Upgraded • Real time flow monitoring system being implemented	Current legislation and safety standards met with significant improvements to reliability and public safety.
Public Works -Sewer Utility		
Success Headlines	Highlights	Results
Program developed to minimize the Infiltration of storm water in to the sanitary sewer systems	• Storm water infiltration testing on all sanitary sewer systems	Resulted in reducing costs related to capacity and treatment issues.

Term Review 2011 – 2014: Recreation Services & Facilities

Success Headlines	Highlights	Results ($ %)
Recreation Department Reduces Annual Subsidy	• Revenues almost double in 2013 versus 2009 while maintaining similar expense level. • 2011- 2013 subsidy reductions vs 2009saves taxpayers almost **$2.2 million.** • **Subsidy reductions total to over $3M including 2014 estimate.**	2009 – ($1.155M) 2011 – ($599K) 2012 – ($412K) 2013 – ($270K) 2014 – ($260K) estimate
SOEC Complex Improves Financial Results and Cuts Subsidy in Half	• Subsidy of the SOEC complex reached $2.2 million in 2009. • Annual subsidies have been reduced each year and project to almost ½ of that in 2014. • (Historically the PTCC and Memorial Arena alone required a $750K annual subsidy.) • 2011-2013 subsidy reductions vs 2009 saves taxpayers almost **$2.1 million.** • **Subsidy reductions total to over $3M including 2014 estimate.**	2009 – ($2.172M) 2011 – ($1,543M) 2012 – ($1.529M) 2013 - ($1.370M) 2014 – ($1.154M) estimate
SOEC Complex Provides Huge Economic Impact	• Sept 2011 to August 2012 Study conducted • Generates Equivalent of 368 jobs • Annual economic activity generated at **$33.9M.**	Direct Spending = $23.9M Ttl Economic Activity = $33.9M
Community Centre Pool Tile Replacement - Safety at Reduced Operational Expense	• Provide consistent safety and slip resistance to all pool users. • Ongoing operational extraordinary maintenance expense reduction with tile replacement.	Consistently safe environment to users of pool. Financial ROI of 23 months.
Memorial Arena roof Assessment Decision Saves Up To $1,100,000	• Previous Estimates to repair roof ranged between $1.2million and $1.7million. • Assessment reveals expense of $569K over 10 years. • Taxpayer savings of up to **$1.1M**	Savings to taxpayers estimated between $631K - $1.131M.
New Events & Festivals Generate Economic Impact of Up to $4,500,000	• 18 new events or festivals past 3 years 2012 to 2014 • Including Rock the Peach, Elevator Race, Trestle Tours, Children's Fest, Scottish Festival, Family Day, Jacked & Juiced • Economic impact estimated between **$3.75M - $4.5M.**	Attendees = 25,000 to 30,000 Impact = $3.75M - $4.5M
Facilities Annual Results Reduces Subsidy	• Climate Action and Green Initiatives with LED	Annual Past Budgets = $3.0M

Term Review 2011 – 2014: Recreation Services & Facilities

Saving Almost $1,000,000	replacement, boiler replacements, building envelope upgrades, low flow plumbing fixtures, mechanical and electrical control system balancing. • Contract cleaning RFP and changes in contractors. • Projected 3 year savings versus previous annual budgets result in **$980K**.	2012 Actual = $2.665M 2013 Actual = $2.7M 2014 Projected = $2.65M Accumulated savings $980K
New SOEC Management Agreement	• 3 separate agreements combined into 1 operations' management agreement. • 1 separate ticketing services agreement • Projected net savings of almost **$1.9M**	Net Management Free savings projected over 5.5 years of $1.897M.
Elimination of SOEC F&B Contract	• With new SOEC Management agreement, 5 remaining years of the current F&B agreement is eliminated. • Projected savings of almost **$660K.**	Accumulated 5 year saving of $660K.
2016 BC Winter Games Awarded to Penticton	• Application Bid in Fall 2012. • Award announced at PTCC January 2013 • Projected economic impact over **$1.7M.**	Projected Economic Impact $1.7M. Community Legacy Fund between $75K - $175K
Beach Vending Management and Control Back to City	• Previously 'operated' by private party. • City takes back 'operations' in 2011. • Beach, Park and Street Vending Program expansion and revenue increases annually. • Additional revenues to the City 2012 – 2014 of **$121K.**	2012 - $14K 2013 - $45K 2014 - $62K
Physical Activity at Community Centre Increases 55%	• Annual number of 'visits' to the Community Centre increased over **55%** from 2009- 2013. • Increase in number almost **200,000.**	2009 – 348,000 visits 2012 – 508,000 visits 2013 – 542,000 visits
Arts, Culture and Heritage Shines With Facelifts	• Cleland Theatre Lobby Renovations 2012 • S.S. Sicamous & Park Restorations & Upgrades 2012 • S.S. Sicamous, S.S. Naramata Restorations & Upgrade 2013 • S.S. Naramata and CN Tug Restorations & Upgrades 2014 • Library Roof 2012 • Library Renovations & Upgrades 2013 • Museum Ceiling, Renovations & Upgrades 2014 • Leir House Upgrades 2014	2012 - $21K 2012 - $305K 2013 - $155K 2014 - $36K 2012 - $75K 2013 - $75K 2013 - $138K 2014 - $38K
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Term Review 2011 – 2014: (Accounting)

Success Headlines	Highlights	Results
Caseware 2014 Implementation and Conversion	• Conversion to new version of Caseware software providing more functionality for audit purposes • Conversion and mapping of previous account information to new account structure • Restructure of financial statements to implement new account structure	• Caseware was made more effective in audited financial statement preparation
Agresso ERP implementation	• Project planning commenced in 2011 and continued through 2013 including: i) Issuance of RFP, evaluations thereof, and reporting out with recommendations to Council ii) Engagement of a project manager iii) Establishment of oversight and management framework iv) Negotiate contract(s) with selected vendor v) Completion of final drafts of key documents including project charter and scope documents vi) Creation of the project plan vii) Plan implementation including meeting for needs analysis, alignment workshops, fit analyses, training viii) Transfer of data and processes to new ERP July 2013	• The project was a major City wide undertaking including the participation of all departments including IT • City now has Eliminated 4 resource intensive applications for a single City-wide ERP system • Significant efficiencies and info access improvements achieved
Agresso Planner Implementation	• Implementation of budgeting software module inside ERP system Agresso • Conversion of 2014 budget data from Excel to Planner • Training of all managers to enter budget information into Planner • Successful entry 2015 budget preparation in Planner • Reduction of risk of data entry errors	• More efficient and accurate budget entry directly into ERP system • Greater transparency and confidence in the annual budgets by the end users
Restructure Accounting department	• To more fully take advantage of the new ERP information system, restructured staff function from task based structure to function/responsibility based structure	• reduced payroll by 1.5 FTE • Moved staff to a

Term Review 2011 – 2014: (Accounting)

	• re-wrote all job descriptions up to Controller • Implemented budget analyst position to administer the City-wide budget Planner module and coordinate the annual budget process	greater breadth of job functions • Increased levels of cross training in department staff

Term Review 2011 – 2014: (Information Technology)

Success Headlines	Highlights	Results
Implemented Enterprise Resource Planning (ERP) system	• Participated in the ERP requirements and selection process • Collaborated with business units in the design of the ERP architecture • Implemented the ERP core software and roll out of the modules for Financials, Payroll, Inventory, Budgeting	• Built a modular foundation of integrated applications that enable the streamlining and automation of current and future business processes.
Enhanced Online Services	• Launched online credit card payments • Launched the Development Services online portal	• Enabled online access to pay for dog licenses, parking tickets and the renewal of business licenses • Enabled online access to the status of permits and inspections
Redesigned Council chambers	• Replaced audio visual equipment • Implemented live streaming	• Created a visually pleasing, user friendly environment • Enhanced the room experience for councillors, staff and guests • Enabled the viewing of meetings remotely using an internet browser or mobile device
Modernized IT infrastructure	• Implemented server virtualization • Upgraded network switching • Upgraded wireless networking • Upgraded uninterruptible power supply	• Reduced 16 physical server computers into 3 reducing overall costs, saving on energy, increasing uptime, improving backups and disaster recovery • Improved network availability, increased speeds and capacity • Improved protection of IT infrastructure, reduced risk of data loss, continued access to communications in outages
Mobilized work force	• Electrical service order management • Secure mobile access from tablets • Enabled ERP app	• Enabled field technicians to receive, work on, update and close service orders in the field. • Enabled secure access to applications and data from cellular connected field tablet • Enabled the approval of time and AP transactions through a mobile application

Term Review 2011 – 2014: (Purchasing Department)

Success Headlines	Highlights	Results
Annual Savings over $1,000,000	• By obtaining prices through Tenders, Requests for Proposals and quotes, the Purchasing Department has saved over $3,669,712.83 since 2012.	• 2012 - $1,038,199.35 • 2013 - $1,086,221.13 • 2014 – Q3 $1,545,292.35
Formal Purchase Requisitions	• Implemented a formal purchase requisition for employees to complete for products/services requested.	• Purchasing staff are able to receive all required information on products/services being requested. • Forms provide work order to charge the products and the proper authority based on the price of the item.
Implemented Agresso Logistics Module	• Warehouse requisitions and goods receipt are being processed at the Yards rather than at City Hall. • Items being issued from the warehouse are entered directly into the system eliminating the paper/entry process.	• Inventory on hand quantities are real time vs being one to two weeks behind. • Potential errors can be addressed and corrected immediately.
Inventory Control Process	• Implemented Inventory Control process based on best practices. • Access to the warehouse has been restricted to ensure the Storekeeper has control.	• Inventory counts are done annually by staff knowledgeable of the products. • If necessary, staff are escorted into the warehouse rather than having an open door.
Insurance/WCB Coverage	• Implemented an Insurance and WCB Coverage spreadsheet accessible to all managers. • Managers are responsible to check that contractors/consultants have coverage in place before approving work.	• Limits the City's liability. • Ensures that contractors and consultants have the necessary insurance and WCB coverage in place before performing work on City property.
Purchasing Policy	• Re-writing the Purchasing Policy to reflect changes resulting from Agresso software. • Adding sustainable section to the policy to ensure the City is participating in reducing environmental impacts where possible and feasible.	• The policy has been to leadership who suggested changes. • Amended policy will be introduced to new Council for adoption.
New Dog Shelter Facility	• Spearheaded the construction of a new Dog Shelter facility.	• Signed 5 year Licence to Use for use of shelter kennels with: • RDOS for $7,500 annually • Keremeos $900 annually • Summerland $1,500 annually